

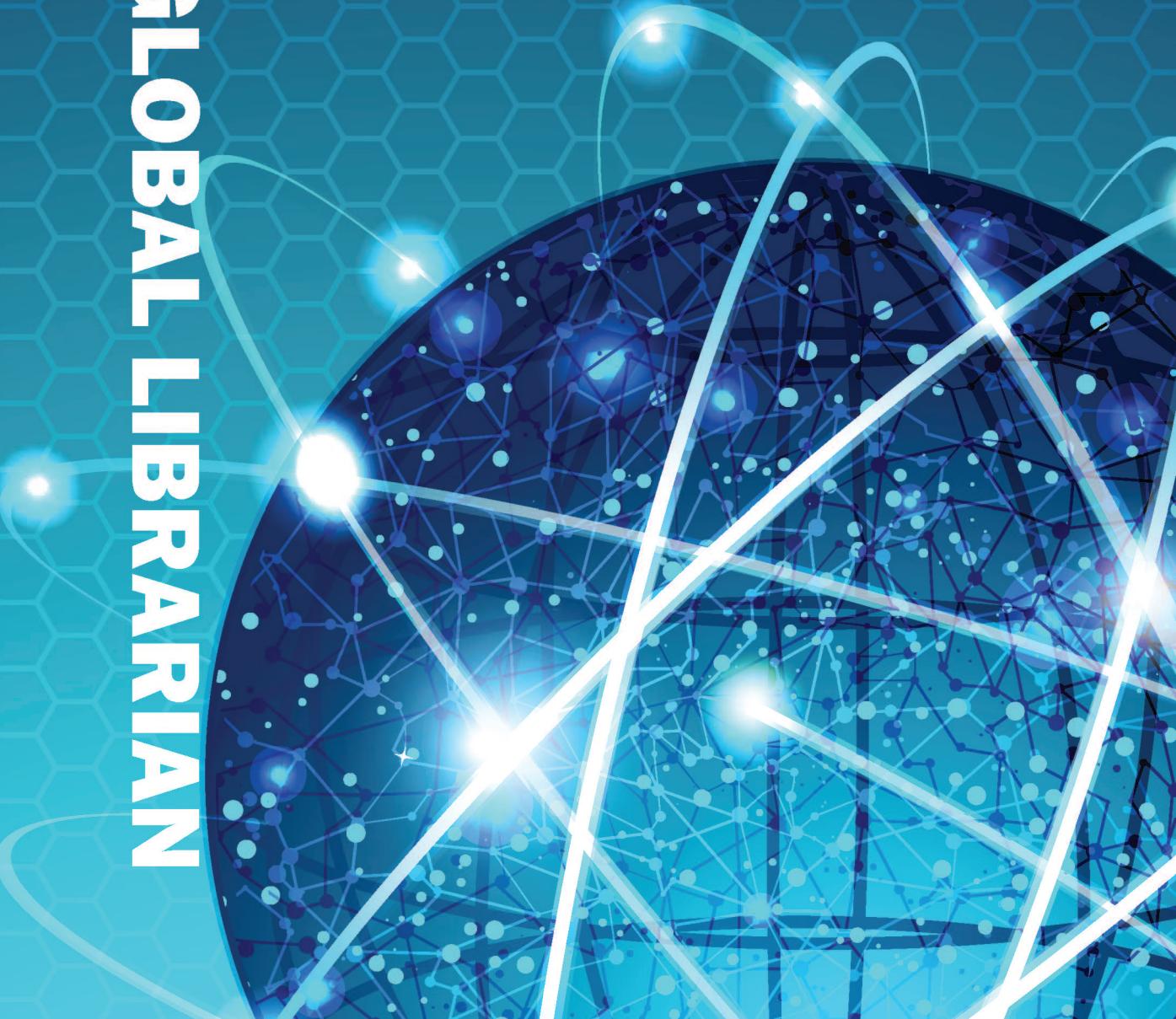
Librarians around the world have designed and implemented creative ways to serve the information needs of their patrons – wherever they may be.

These are their stories.

Presented by:



# THE GLOBAL LIBRARIAN

A large, stylized graphic of a network or globe, rendered in shades of blue and white. It features a dense cluster of small blue dots connected by thin white lines, representing a network. Several bright, glowing white dots of varying sizes are scattered across the network, some with white lines radiating outwards, suggesting a global reach or connection points. The graphic is set against a background of a repeating hexagonal pattern, similar to a honeycomb, in shades of blue.



Metropolitan New York Library Council (METRO) and Greater New York Metropolitan Area Chapter/Association of College and Research Libraries, Inc.



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# CONTENTS

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Introduction.....	1
<b>FROM THEORY TO PRACTICE: GLOBAL LIBRARIANS IN ACTION.....</b>	<b>13</b>
Takin' It To The Streets: myMETRO Researchers Bring Library Science Skills and Expertise to NYC Communities.....	14
Cape Crusade: Building the Steve Biko Centre's Library and Archive in South Africa's Eastern Cape .....	34
Promoting Information Literacy through Engagement with Wikipedia.....	49
Disseminating Moving Image Websites with a Web 2.0 Centralized Hub.....	69
International Partnerships - Cases and Working Experience .....	95
A Global Book Exchange: Creating Partnerships across the Sea.....	118
Implementing the Learning Commons in a Middle Eastern University Library: The Case of Zayed University .....	135
Transcending Ethnic, Racial and Political Conflict to Achieve Understanding between the Greek and Turkish Cypriot Library Communities .....	156
<b>WHEN GLOBAL BECOMES LOCAL: SERVING DIVERSE POPULATIONS.....</b>	<b>182</b>
Escucha Mi Voz: Engaging Local People in Global Communities.....	183

Non-western Students in Western Universities: Bridging the Plagiarism Divide .....	207
Supporting NYU's Worldwide Users: Academic Technology Services for the Global Network University.....	224
<b>AROUND THE GLOBE: LIBRARIANS ON THE INTERNATIONAL SCENE ..... 242</b>	
Cultures of Access: Differences in Rhetoric around Open Access Repositories in Africa and the United States and their Implications for the Open Access Movement .....	243
Critical Information Literacy and the Technology of Control: The Case of Armenia .....	262
A College Library in African Culture: a Case Study of Global Librarianship in Kampala, Uganda.....	283
<b>SHIFTING ROLES: LIBRARIANSHIP IN A GLOBAL COMMUNITY..... 311</b>	
The Library Has Left the Building: Mobile Librarianship's New 21 <sup>st</sup> Century Role.....	312
Local Connections to Global Collections: The Power of Interlibrary Loan Services.....	339
Beyond Embedded: Blended Roles for Information Professionals in the 21 <sup>st</sup> Century Knowledge Economy.....	358
About the Contributors .....	386

## Introduction to *The Global Librarian*

The term “global” can mean a number of things; all-encompassing, relating to the planet or the entire globe, or as a means for describing a world connected as a single community via technology as in, the “global village.” In *The Global Librarian*, we also define “global” in several ways. More obviously, “global” relates to the work of librarians in worldwide, whole-world community spread both near and far. It also refers to librarianship as a more comprehensive service profession, one that takes into account the wholeness or connectedness of communities, which, while diverse in nature, have the universal need for untethered access to information. Finally, but no less importantly, we look to the definition of “global village” to underscore one of the primary purposes of this publication, and how librarianship is changing to accommodate a global society: “When we define society today as a ‘global society’ we are saying that we are, or at least we strive to be, an *interconnected* society, even more than if we were to say society is ‘worldwide’. In a global society, borders are crossed, and the phrase implies interaction, participation, and inclusiveness.”(Gendron, 2009, p. 26)

Whether your work as a librarian takes you outside the US or not, the need for diversity awareness is essential (Ryan & Qayyum, 2012) as is the cognizance of different ways intellectual property, copyright issues, and trade agreements play out in the international context. Jones reminds us that “a publicly funded library is usually subject to privacy laws and regulations at its country’s national, local, and state levels—and to regional and international agreements, some of which are nonbinding” and that, while the European Union is subject to the 1995 European Union Data Protective Directive, most

countries in the developing world have very few privacy laws, regulations, or directives. (Jones, 2010, p. 9) Many developing countries do not yet have a national information infrastructure. This not only affects deliverable services, but can severely influence—and limit—the ability of government organizations to make informed decisions, particularly regarding online services. “Those governments’ decision makers have not directly experienced the value of Web 2.0 and other technology for public policy work. Library and IT staff in those countries do not have workplace access to computers and the Internet. . . . Nor do they have access to technology training programs or experience with user services and interfaces.” (Jones, 2010, p. 10)

This need is not limited to public libraries. There is a growing trend of internationalization in American higher education as well, and with that comes the need for librarians to become more aware of cultural diversity and how that might affect library services. “The education of ‘global citizens’ has become a standard goal for many institutions. Study abroad, the creation of branch campuses overseas, recruitment of international students, targeted development of area studies and language programs, and overall curriculum overhaul are some of the methods commonly used to achieve this goal.” (Hammond, 2009, pp. 88–89) American institutions such as Yale University have responded to the globalization of education by sponsoring an active Visiting Librarian program, library-driven pre-travel sessions on access to information and orientation to doing research abroad for faculty and students, and ensuring access to information through formalized arrangements (Memorandums of Understanding a.k.a. MOUs) with partner institutions. (Hammond, 2009) Margaret Law wonders how a library can respond to and become part of the internationalization of the university. (Law, 2010) And clearly “it is important to remember that ‘global access’ should refer not just to information retrieved online, but also to the myriad

institutions beyond national borders that provide access to information resources and services." (Hammond, 2009, p. 96)

This calls for a possible paradigm shift in library and information science programs, particularly in the United States. Coursework in global librarianship might be offered, as well as diversity training. Minimally, those working toward a career in academic librarianship should be well-versed in the ACRL Diversity Standards: Cultural Competencies for Academic Libraries, ("Diversity Standards," n.d.) All LIS students would benefit from these simple steps. "The urgent need is to understand the characteristics of diverse communities so individuals can be taught how they can reach out and communicate with each other for effective knowledge transfer. An ideal state will be achieved when minority groups are able to connect with and be identified as part of the community, and the majority population is able to understand and accommodate minority cultures." (Ryan & Qayyum, 2012, p. 226)

Green, whose study examined the role of academic librarians at institutions with global initiatives, provides good literature reviews on the history of transnational education as well as on international education and libraries. Based on the results of a distributed survey, she notes the increasingly interactive and crucial role of the embedded librarian at international branch campuses despite the stresses and obstacles created within this evolving environment. (Green, 2013) Our role as librarians is shifting in the context of a global service community. One librarian sees herself as a "knowledge counselor" because in addition to instructing patrons on how to find information she is "counseling them in their own process of knowledge-seeking." (Gendron, 2009) Several years ago Wheaton and Murray called for librarians to make the transition to "knowledge librarian" by shifting their roles to become "content czars," "knowledge brokers" and lead agents of change. (Wheaton & Murray, 2009) As others rightly note "librarians

must also be aware that in the era of global education space and multiculturalism, library users can come from different cultures with different educational backgrounds, searching habits and attitudes." (Wiorogórska & Rehman, 2012, p. 22) Interestingly, their research has found that in this global environment students prefer to communicate and share information via face-to-face contact, while their preferred source of information was online resources. (p. 30) The influence of different cultures on people's behavior cannot be ignored while discussing about KS [Knowledge Sharing]." (25) This is important for librarians to consider as they plan programs and services.

Librarians attempting to provide services and access to information in a global community, we must not lose sight of Gorman's values: stewardship, service, intellectual freedom, rationalism, equity of access to recorded knowledge and information, and democracy. (Gorman, 2000: 26-27) While Foster and McMenemy observe that within the global context "on the face of it there are just three values on which there is a clear global consensus, and those values are service, privacy and equity of access."(Foster & McMenemy, 2012, p. 259) The foundation of modern librarianship rests on an essential set of core values that define, inform, and guide our professional practice. These values reflect the history and ongoing development of the profession and have been advanced, expanded, and refined by numerous policy statements of the American Library Association. Among these are: access, confidentiality/privacy, democracy, diversity, education and lifelong learning, intellectual freedom, preservation, the public good, professionalism, service, and social responsibility ("Core Values of Librarianship," n.d.)

Good librarians are good librarians, regardless of the time, place or platform of their services. The authors of this anthology are proof of that.

The editors have organized *The Global Librarian* into four thematic sections: “From Theory to Practice: Global Librarians in Action” spotlights specific “global” endeavors orchestrated by librarians; “When Global becomes Local: Serving Diverse Populations” focuses on the changing role of librarians as the international community meets us at our doorsteps; “Around the Globe: Librarians on the International Scene” looks at programs and services implemented by librarians beyond their physical environs; and “Shifting Roles: Librarianship in a Global Community” gives us a glimpse of things to come.

## **Chapter Summaries:**

### **From Theory to Practice: Global Librarians in Action**

This section of *The Global Librarian* highlights programs and activities of librarians whose work has demonstrated practical applications of librarianship in a global context. In “Takin’ it to the Streets: myMETRO Researchers Bring Library Science Skills and Expertise to NYC Communities” Nielsen recounts how the myMETRO Researchers Project created an opportunity for New York City reference librarians to get out from behind the desk and into their service communities. Schlesinger recounts his experience in the Eastern Cape and Johannesburg, South Africa as a Fulbright Senior Specialist in “Cape Crusade: Building the Steve Biko Centre’s Library and Archive in South Africa’s Eastern Cape.” In “Promoting Information Literacy through Engagement with Wikipedia” Turner offers some practical tips on how to use a Wikipedia critique assignment to promote information literacy. Among other things, students were asked to evaluate Wikipedia articles for effective use of a specific entry’s references and to do a comparison with traditional scholarly resources. While the

focus here is on a freshman-level college course, both the assignment and the lessons learned may be applicable in a myriad of other settings. The chapter “Disseminating Moving Image Websites with a Web 2.0 Centralized Hub” includes a study on how one librarian at City University of New York’s largest community college met her college’s need for centralizing moving image websites through the establishment of a centralized Moving Image Media Hub.

Xin Li’s “International Partnerships: Cases and Working Experience” offers an overview of four partnerships with libraries in China and Taiwan, including lessons learned, the challenges of U.S. research libraries, and the necessary skills to be a “global librarian.” Wang and Mulligan’s “A ‘Global’ Book Exchange: Creating Partnerships across the Sea” outlines the development of a pilot book exchange between Binghamton University Libraries (SUNY) and Beijing Normal University Library – a project that began in 2008 and was completed in 2011. This chapter offers a rare glimpse into some of the behind-the-scenes efforts on the part of both institutions to ensure the success of the project as well as a hint of potential future collaborations with other libraries in China. “Implementing the Learning Commons in a Middle Eastern University Library: The Case of Zayed University” explores the introduction of the learning commons model at Zayed University in the Middle East and its impact on students understanding of the library’s importance for their successful completion of their research needs. Constantinou describes the work of a Fulbright Scholar in the field of library science in Cyprus through the development of bi-communal programs for the Cypriot library communities in “Transcending Ethnic, Racial and Political Conflict to Achieve Understanding between the Greek and Turkish Cypriot Library Communities”

## **When Global becomes Local: Serving Diverse Populations:**

In this section, we hear from librarians who have first-hand experience serving diverse populations, and how they identified and addressed a new point-of-service need. For example, the librarians at Denver Public Library (DPL) – Bolen, Chan, Romero, Kemmerling and Ye Kiang – offer some insights into providing quality service to immigrant populations in “Escucha Mi Voz: Engaging Local People in Global Communities” by describing the development of dedicated Learning and Language programs at the six branches of DPL. While they highlight several of their “non-linear” programs, of particular note is *Plaza*, which provides both a space and a forum for patrons of all ages and backgrounds to come together to exchange ideas, information and resources. Madray’s “Non-western Students in Western Universities: Bridging the Plagiarism Divide” reminds us that differences in culture, customs language and religion, coupled with western expectations regarding research and academic writing, may present challenges for non-western students. Russell and Smith discuss the challenge of maintaining quality academic technology support to students, faculty and staff located on New York University’s branch campuses, as part of their Global Network University, in “Supporting NYU’s Worldwide Users: Academic Technology Services for the Global Network University.”

## **Around the Globe: Librarians on the International Scene:**

In “Cultures of Access: Differences in Rhetoric around Open Access Repositories in Africa and the United States and their Implications for the Open Access Movement” Bowdoin reviews the definitions and variant approaches to open access

(OA), and what they might mean as a mechanism for correcting the inequities in information flow between industrialized and non-industrialized nations. Her study examines the rhetoric used to present the OA institutional repositories in the United States and Africa, and speculates on what this rhetoric might tell us about different “cultures of OA.” The authors of “Critical Information Literacy and the Technology of Control: The Case of Armenia” discuss why critical information literacy and critical pedagogy are particularly important in the Armenian context with its historical, cultural and geopolitical concerns. They argue for an open online culture with local self-determination and the basic right to share and produce information. “A College Library in African Culture: A Case Study of Global Librarianship in Kampala, Uganda” looks at Wightman’s experiences as librarian in Kampala, Uganda, and her attempts to fully engage in and understand library service needs in a new cultural context.

## **Shifting Roles: Librarianship in a Global Community:**

This section introduces us to some new “global” twists to some traditions librarian roles. An exploration of mobile library and information services in the context of a digitally-mobilized populations is the subject of “The Library Has Left the Building: Mobile Librarianship’s New 21st-Century Model” by Sara Wingate Gray. Included also here are case study examples of non-mainstream, alternative moveable libraries and itinerant librarians. In “Local Connections to Global Collections: The Power of Interlibrary Loan Services” Posner notes that by enabling the sharing library material with local, regional, national and international partners, interlibrary loan librarians are, by definition, “librarians without borders.” Finally, the authors of “Beyond Embedded: Blended Roles for Information

Professionals in the 21st Century Knowledge Economy” demonstrate how librarians at the University of Toronto Libraries in Ontario, Canada have embedded and blended roles as market intelligence information specialists.

In this increasingly global environment, the strength of any library or library organization rests on the librarians’ ability to collaborate and connect with partners within and beyond their institutions. It is therefore fitting that the publication of *The Global Librarian* is the result of a joint partnership between the Metropolitan New York Library Council (*METRO*) and the Greater New York Metropolitan Area Chapter of the Association of College and Research Libraries (*ACRL/NY*). For today’s librarians, forging community partnerships is key to success, both for individuals in the profession as well as for the institutions at which they work. This remains true for this publication as well. The editing team, librarians all, hails from a variety of backgrounds and types of library experience, each enthusiastically offering a unique approach and special talents to this project from its inception. They should be acknowledged here: Jason Kucsma (*METRO*); Lisa Chow and Sandra Sajonas (*People Interact*); Caroline Fuchs and Carrie Netzer Wajda (*ACRL/NY*). Their dedication, professionalism and “commitment to the cause” have made this publication possible. (A personal thank you is owed to Jason, who still answers my calls even though he has caller ID.)

The time is right for this publication. Although there is a fair amount written about international librarianship and education, not much has been published on the role of the librarian in a more global sense.

New challenges are emerging for the global librarian, who must take into consideration questions that our predecessors never had to face. How can we assure quality, equitable access to all while encountering a growing digital divide? How do we

meet the needs of increasingly diverse constituencies? How might we best serve international students and online learners? How can we overcome language and cultural barriers? How do we communicate and share information without a baseline understanding of intellectual property and copyright issues? How do we address broadband and connectivity issues? How do we provide technological support and adequate staffing in different time zones or on different continents? How do we need to change our own library's culture to address the needs of a "global community" environment? How can our institutions fill the emerging need for a "global" approach to librarianship?

This publication attempts to begin to address some of those questions set forth above. And while librarians may not have all the answers quite yet, it is good that we are asking the questions.

We hope *The Global Librarian* is both a springboard and conduit for that important conversation. We cannot move forward alone.

Caroline Fuchs, with Lisa Chow, Jason Kucsma, Sandra Sajonas, and Carrie Netzer Wajda.

2013

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# FROM THEORY TO PRACTICE: GLOBAL LIBRARIANS IN ACTION

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# **TAKIN' IT TO THE STREETS: MYMETRO RESEARCHERS BRING LIBRARY SCIENCE SKILLS AND EXPERTISE TO NYC COMMUNITIES**

**TOM NIELSEN**

**METROPOLITAN NEW YORK LIBRARY  
COUNCIL**

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## ABSTRACT

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The myMETRO Researchers project created an opportunity for local librarians to get out from behind the reference desk and into their communities to sharpen their research and critical inquiry skills while helping to satisfy an information need for or about a specific community. This chapter discusses the project in-depth, its inspirations, life cycle, challenges and outcomes, with contributions from the project teams about their research and experience. Library organizations and groups are encouraged to replicate the project in their communities and guidelines are offered to help overcome the initial challenges we experienced.

**Keywords:** librarians, service learning, local communities

# **TAKIN' IT TO THE STREETS: MYMETRO**

## **RESEARCHERS BRING LIBRARY**

## **SCIENCE SKILLS AND EXPERTISE TO**

## **NYC COMMUNITIES**

As a member driven organization, the Metropolitan New York Library Council (METRO) serves libraries, archives and museums in New York City and Westchester County, New York, helping them remain relevant and accessible in a rapidly changing knowledge landscape. METRO members benefit from many programs and services including resource sharing, grants and advocacy, but METRO is known regionally for its strong professional development program which provides an anchor for the library community to assess our professional direction and navigate industry changes.

In 2008, METRO expanded membership for the first time since its inception in 1964, creating myMETRO, a membership option for individual information professionals, library school students, unemployed librarians, and retirees with intent to improve members' skills as well as their leadership capacity. Like METRO's member organizations, myMETRO members receive discounts on professional development workshops; however the focus is on career development with additional benefits like a resume makeover, mock interview and scholarships for professional development activities. The myMETRO Researchers project was developed to make myMETRO membership benefits more attractive while adhering to the mandate to raise the skill levels of members. This chapter will describe in-depth the origins of the project and its life cycle including comments by each team about their process and research findings so that other library

organizations can replicate the results, engage with their community and add to the professional literature.

Part of my job as METRO's Member Services Manager is to watch for programs and/or services that METRO can develop that add value to all members. For example, in 2007 I began negotiating with vendors to offer discounts to members as part of a Vendor Partnership program, which now includes twenty different vendors. This watchfulness was in place when I read *Weapons of Mass Instruction: A schoolteacher's journey through the dark world of compulsory schooling* by John Taylor Gatto (2010). Gatto was New York City Teacher of the Year in 1990 and New York State Teacher of the Year in 1991. He has written extensively about alternative learning opportunities outside the classroom and offers many examples in this book. One program he created for his students was, "Gatto's Guerillas" in which students investigated an issue or organization and wrote a paper about it. He encouraged his students to not be intimidated if they wanted to pursue large organizations like New York City government or a large corporation. What inspired me about this project was the focus on learning outside a "home base". I connected this with librarians and archivists who have a "home base" as well, but who could benefit by leaving the comfort of home base to expand both their learning potential and the reach of information professional skills like critical inquiry and research.

Around this time I came across a digitized collection of papers and photos on the Bank Street College of Education website. This particular collection, from 1948, documented a program at the school called the Long Trip in which a group of students travelled to Tennessee to visit schools, communities and notable sites as a way of investigating current social and political issues affecting children, their families and the implications for education. Photos and reports by students

attest to their goal of understanding this culture better and the role that education plays; another example of professionals leaving their home base in order to expand their learning potential and develop their skills.

## Project Life Cycle

The myMETRO Researchers project emerged out of these examples as a special members-only benefit with the following targeted goals for participants: gain experience researching a cutting-edge topic, make contacts outside the library world, create a positive and helpful impression about librarians, add research to each participant's resume and gain exposure within the local library community. Participants would do this by starting with a broad topic and a self-selected team, based on topic interest. Teams would have three to four members and their research would start with the team attending a public meeting of a group already working on this topic in some capacity. To focus their topic, team members would conduct a reference interview of group organizers and use a research topic proposed by the group, or identify an information need through the interview. Teams would then refine their topic into a research question and begin outlining their work and assigning responsibilities for research and writing. The product of each team's efforts would be a research report including background information, a literature review, current trends, findings of the team, bibliography and resources for further inquiry. The reports would be published on METRO's website, earning each participant a publishing credit and, for added incentive, a professional development credit for future use.

Starting an untested project such as this means accepting the risks that come with it, including the possibility of failure. As we'll see, not every variable is foreseeable, so in anticipation of these potentialities, I solicited feedback on many aspects of the

project from METRO staff, the myMETRO Advisory Council and specific members. I marketed myMETRO Researchers as a pilot project, fully intending to document my process and that of each team so that if successful, the project could be refined for future teams but can also be replicated by other organizations. The project life cycle reflected this openness to risk and set out only milestones, leaving many gaps for teams to fill in as the project progressed. This was intentional, forcing teams to redirect their focus if they encountered dead ends.

Consequently, I tried to provide as much support for teams as possible. Anticipating confusion about the project, I created a lengthy project description listing elements of the project life cycle, examples of local industries and civic organizations as well as an example of a project focused on a local group called the New York City Community Garden Coalition. Meeting space for teams would also be a concern and METRO's Training Center would be made available when not in use for workshops. I created a Project Data Form for teams to keep track of each other and their progress as well as deadlines. Two individuals would assist teams: myMETRO Advisory Council member Ma'lis Wendt, a retired New York Public Library manager, would be available to advise on team dynamics and I would be available to provide referrals to other library professionals as needed, but also to assist if team members needed to gain access to restricted research facilities.

## **Project Launch**

The project was announced to myMETRO members on December 19, 2011 with an informational meeting and formal project launch scheduled for January 18, 2012. I received a cautious reception from members; of over 200 total members, 17 attended the informational meeting in which I talked in depth about the project and answered questions. Although not

all in attendance could commit to the project, the remaining fifteen participants identified five project teams based on the following topics: Lifelong Learning, Fashion Blogging, Humanities Education, Social Media, and Occupy Wall Street, which had started in New York City in October 2011. Our teams contained the diversity of librarians in the community: four academic librarians, seven new or recent library school graduates, a librarian in transition and a retired librarian. I was pleasantly surprised that two of the academic librarians became myMETRO members just to participate in this project.

My hunch that the demands of the project would bring about changes to the teams manifested itself early on. The Social Media and Humanities Education teams each lost one member causing the Humanities Education team to disband and the remaining team member to join the Lifelong Learning team. Apparently, participants quickly realized that this project would require a time commitment that some found difficult to accommodate due to limited availability, especially students already carrying a full course load.

## **Initial Challenges**

Each team faced challenges before identifying their final research topic so I asked them to share those challenges with me for this chapter.

Fashion Blogging Team – Kimberly Detterbeck, Nicole LaMoreaux and Marie Sciangula “One of the Team’s greatest challenges came early in the project’s development: identifying a manageable population of fashion bloggers to study. The fashion blogging industry is too diverse and widespread a population to single out a small group with which to interact and study as the [project] developers initially intended. Instead, the Fashion Blogging Team decided to conduct an information-

seeking behavior study in order to discover the information literacy practices of fashion bloggers as a unified population.”

Social Media Team – Judy Lee, Ann McGettigan and Evelyn Shunaman “Our biggest challenge was building trust with a client. The Social Media Team initially reached out to Rachel Sterne, chief digital officer of New York City’s Social Media Advisory and Research Taskforce (SMART). We offered our services to SMART to assist emerging City agencies with research on social media, evaluating new social media platforms, updating social media guidelines and policies. The NYC Digital Office did not respond to our offer of research assistance. After several offers to other city agencies, Friends of PS 217 agreed to become our ‘client’. It is an educational support organization based in the Victorian Flatbush section of Brooklyn. The mission of this newly-formed 501c3 non-profit is to raise funds to supplement the educational and enrichment opportunities offered by this public elementary school. The Social Media Team met with the board members of Friends of PS 217 three times. It was determined that the researchers would provide assistance in the following areas: developing bylaws, determining methods to identify potential donors and other funding sources, using social media effectively in this effort, creating appropriate content for social media tools; and identifying best practices (and lessons learned) from similar groups operating elsewhere.”

Lifelong Learning Team – Susan Chute, Marilyn Kahn, Rajni Misra and Robert Weiss “Our initial interest was to explore learning opportunities for older adults. The group struggled to decide where to focus, given the wide range of educational choices for older adults. Team members had basic knowledge of Elderhostel and SeniorNet, both of which are national initiatives. Also, TED (Technology, Entertainment and Design) Talks seemed to fall into the category of lifelong learning, and increasingly, MOOCs (massive open online courses) had

entered into the array of choices. Before we could figure out how librarians might have an opportunity to distinguish themselves in the world of lifelong learning, we needed to do some in-depth research to better understand these organizations. Supplementing our research from online and other published sources, we sought opportunities to speak with people at sites in the Metro area. Ultimately, having uncovered a tremendous amount of resources, we arrived at our decision: to compile our research on this cutting-edge topic, and make this information available to librarians to provide to their patrons.

Occupy Wall Street Team – Angela Ecklund, Darcy Gervasio and Arieh Ress "...our group set an initial goal to simply find out what Occupiers wanted to know. After corresponding with librarians working with the group, we decided to provide an annotated bibliography for the People's Library on a topic that would be determined by reaching out to Occupy Wall Street members working on the front lines... Between January and March 2012, we attended Occupy Wall Street forums, informal meetings, a panel at ALA Midwinter, and visited a bookstore where The People's Library was temporarily housed. At these events, we offered "research librarian services" to anyone who was interested. While we were generally welcomed, we were surprised to encounter skepticism and mistrust from some of the Occupiers at the outset. When we finally met with a volunteer from the People's Library, we learned that many Occupiers were reluctant to trust us due to recent infiltration by law enforcement and fresh memories of the NYPD raiding the People's Library in Zuccotti Park in November 2011... As we learned more about the movement, it became clear that offering free research help to one of the subgroups of Occupy Wall Street might be a more manageable place to start. Through the People's Library, we were introduced to members of the environmental subgroup, dubbed the Eco-Cluster...Our final topic was suggested by a member of Occupy Oakland in

response to a discussion question we posted to the Eco-Cluster's Google Groups forum. In preparation for an environmental advocacy event, Connect the Dots Climate Impacts Day, on May 5, 2012, members of the Eco-Cluster needed data and research that would make the local, regional, and national consequences of climate change relevant to everyday people. As academic librarians, our team had access to scholarly environmental science databases that members of the Eco-Cluster did not. The annotated bibliography we compiled was also useful for Eco-Cluster members attending the United Nations Rio+20 Conference on Sustainable Development in June 2012."

As the project organizer, I was called on by each team to provide assistance. Both the Fashion Blogging and Occupy Wall Street (OWS) teams requested support in lending legitimacy for their research and each made use of free online tools to accomplish that. The Social Media team heard Rachel Sterne speak at METRO's Annual Meeting and requested an introduction, unfortunately this didn't help. The Lifelong Learning team and I held a conference call to discuss ways of refining their research topic and I provided feedback on interview questions they developed.

At a mid-project meeting, held on March 15, 2012, I asked the teams to summarize their progress so far and offer several challenges they faced. Surprisingly, each team had similar challenges: establishing legitimacy and trust, focusing their research topic and having a plan B if initial ideas didn't pan out. The teams also offered ideas and advice to each other on ways to overcome some of their challenges.

By the next meeting, scheduled for April 23, 2012, each team had made significant progress on their project and teams shared smaller challenges and more successes. In addition, I requested that one team member summarize their research and

progress and send this to the myMETRO email list to publicize the project, generate interest among all members and follow up with members who were unable to participate but were interested in the outcome. Lastly, each team set a project report deadline of June 15, 2012. Below each team shares highlights of their research process:

Fashion Blogging Team – Kimberly Detterbeck, Nicole LaMoreaux and Marie Sciangula “Following an accepted methodology for studying information seeking behavior, the Fashion Blogging Team crafted a 20 question survey in order to query fashion bloggers on how they find and use the information needed to create blog posts. The Team also created an eight question questionnaire to follow up with those bloggers who agreed to be contacted for further input. The largest challenge the Team faced by far was distributing the survey and soliciting responses. A large channel of distribution was through social networking sites such as Facebook, Twitter, Pinterest, Tumblr, LinkedIn, and the discussion board of a fashion blogging group, Independent Fashion Bloggers (IFB). The Team also sent targeted emails to fashion bloggers featured in the publication, *Style Diaries: World Fashion from Berlin to Tokyo* by Simone Werle, an international fashion blog directory... In an effort to be taken seriously and to not be perceived as “spam” or “pitches,” the tone of the communication with fashion bloggers was initially perceived as too formal and thus blatantly interpreted as outside their community. The Team adjusted the tone of the direct communication to bloggers; they took a more informal and relaxed tone when using social networking tools and sending emails. After two months and 31 responses, the Team decided to close the survey and move forward with analyzing the results. Given the small sample size it is understood that the conclusions

drawn may not be representative of all fashion bloggers. The low response rate can be attributed to the difficulties connecting with fashion bloggers amid the sea of correspondence they receive.”

Social Media Team – Judy Lee, Ann McGettigan and Evelyn Shunaman “The group compiled a primer with best practices from successful programs, such as the Public Education Network (PEN) and the New Jersey Education Foundation Partnership, Inc. We also interviewed foundations, such as ... the Dearborn Education Foundation in Michigan, for fundraising recommendations. We also developed a Social Media check off list:

1. Develop your mission statement
2. Create your governance.
3. Designate a web master
4. Create your brand: logo, tagline and avatar
5. Set up a Google/Gmail Account and a Google+ Profile.
- 6: Make it easy to give! Set up PayPal accounts and spend money on a ‘donate now’ button.
7. Develop a strategy on how to tell your organization’s story. Use less text and more images on your website and social media sites. (Gather archival materials, photos, video, inspiring quotes)
8. Within the past 10 years, email has become a top revenue generator for many nonprofits...Start by embedding social media links into your emails.

Lifelong Learning Team – Susan Chute, Rajni Misra, Marilyn Kahn and Robert Weiss “We began the project by focusing primarily on lifelong learning institutes, which typically are in a classroom setting. The scope of the project expanded greatly when our research delved into the exploding world of online learning. We met the challenge of being geographically distant from one another by working independently for a time,

meeting (physically or virtually) to exchange ideas and re-focus, and then continuing our independent work. We searched online for information about lifelong learning in general, and we explored the websites of lifelong learning institutes. We then compiled a fact sheet and a list of questions to ask leaders of lifelong learning sites in the New York metropolitan area. Being geographically dispersed proved to be a strength as each member focused on a site in his/her geographic area, giving us a broader sample. Although we had developed a list of questions, we chose to conduct open ended interviews with our contacts to enable them to communicate their concerns. Our descriptions of these local implementations incorporated information from their websites, interviews, and classroom observation. Lack of response from some sites limited our fieldwork, but it also led us to identify weaknesses in the programs. To compare lifelong learning institute offerings with public library programs, we each also chose a local public library to focus on. We supplemented our fieldwork with knowledge gleaned from our own professional library experiences. To describe opportunities to learn at home, we explored many online learning programs as well as examples of telephone learning. Because of the high visibility of online learning in the media and the increasing popularity of these programs, we chose to increase our focus on this area... By May, we specified that we were increasingly interested in how lifelong learning programs addressed the educational and social needs of their communities and how institutes of lifelong learning could collaborate with public libraries. We tailored the outline of our report to be useful to public libraries. We decided to produce an extensive appendix and annotated bibliography as a resource for anyone interested in lifelong learning. Our research showed that while people who enroll in local lifelong learning programs gain satisfaction from them, many of these implementations are not as visible as they could be... From our research into online learning, we were able to offer a comparative/descriptive summary of ten top online

learning sites. We observed that the recent proliferation of MOOCs (massive open online course) is similar to the explosion of public libraries at the beginning of the 20th Century. MOOCs provide an opportunity for FREE quality self-education with the added aspect of a social (or group learning) component. For librarians, MOOCs offer an opportunity to seize the moment to develop reference services customized to online learners.”

OWS Team – Angela Ecklund, Darcy Gervasio and Arieh Ress

“Social media and web conferencing technology proved not only vital to communicating with members of Occupy Wall Street but also with each other. We created a gmail account specifically for the project, [mymetrows@gmail.com](mailto:mymetrows@gmail.com), so the Occupiers could email our research team. We conferred with Eco-Cluster members on Google Hangouts and posted a call for research topics as well as the final annotated bibliography on climate change on the Eco-Cluster’s Google Group. Using the social media technologies favored by OWS members allowed our group to communicate with OWS more effectively. One unexpected challenge was sharing resources among each other: each of us works at a different academic library with differing database access. While it was a boon to have the resources of several institutions available to the project, sharing the full text of articles proved erratic and brought up copyright concerns. Technology proved essential again as we used Google Docs to write our annotations, Google Hangouts to conference, and Zotero to share bookmarks and tag citations for our annotated bibliography. We eventually exceeded the 100MB attachment limit on the free version of Zotero, but we were at least able to use the platform to share the citation information, even though we could not always share access to the articles themselves.”

Although their summary postings only generated a handful of responses from myMETRO members, I was encouraged by the serious effort apparent in each report and began preparing for an evening of presentations by each team on July 2, 2012. When the reports arrived in mid-June, I marveled at what each team was able to create. The reports were unique and thorough investigations suitable for publishing and very helpful for the community they focused on. The project reports can be found on METRO's website at: <http://metro.org/articles/takin-it-to-the-streets-mymetro-researchers/>.

## Outcomes

Each team experienced different successes based on their project work.

- As a whole, the myMETRO Researchers teams received an enthusiastic reception from a diverse group of 20 students and professionals at their initial project presentation on July 2, 2012;
- For METRO, the success of the teams and the project reflected back on METRO, so I was happy to offer each team member more than the promised professional development and publishing credits: each team was invited to present at METRO's Annual Meeting on January 15, 2013 and each participant received an automatic membership renewal;
- The OWS Team received feedback that spoke directly to the project goal of creating a helpful impression of librarians, one beneficiary commented, "Our group, Climate Action/Brooklyn for Peace, wants to start doing 'impact of climate change on different neighborhoods' outreach and education, so this [research] will be very useful...Thank you thank you thank you. We love librarians!";

- Friends of PS 217 used the report by the Social Media Team to establish their bylaws and as a reference while moving their organization forward. They also asked team member Evelyn Shunaman to be on the Board of Directors;
- Susan Chute, a Lifelong Learning team member, is developing a workshop for METRO on MOOCs;
- The Fashion Blogging Team was invited to present their findings at two conferences: LIM College's Fashion Now and Then symposium which focuses on past, present and future uses of fashion information, and as part of a panel on fashion resources in art libraries at the 2013 Art Libraries Society of North America (ARLIS) Annual Conference in Pasadena.

## **Replicating the myMETRO Researchers Project**

Overall, the myMETRO Researchers Project was a success and I look forward to repeating the project with a new group of members in February 2013. The project objectives are not specific to any one locality and I encourage other groups to try a similar project with librarians and information professionals in your community. Here are some guidelines to follow when planning a similar project in your local community.

### **Finding project participants**

The member-driven organization: a library consortium or library association is the best group for replicating this project. They have access to large groups of librarians, especially those looking for work or interested in keeping up their skills. The project provides a means of adding value to members with limited cost or time commitment required of the organization.

However, enterprising librarians could empower themselves to embark on a similar project without a sponsoring organization.

## **Identifying a topic**

Even with a research process template and project example, teams were forced to chart their own course, from choosing their topic to defining the focus of their research. Yet the inherent uncertainty provided fertile ground for learning and team building. To avoid frustration among participants during this process, teams should be told to expect this and be open to the learning opportunity. The support of an outside facilitator can help smooth the way by organizing their ideas and reminding the team of project goals. However, not all communities provide the wealth of opportunity that New York City does and this may present a challenge in finding a topic or opportunities to choose from. Regardless, teams should be advised to remain flexible, watch for road blocks and have a Plan B just in case.

## **Utilizing technology**

Teams can tap into many free online tools to help them communicate and assemble their writing. Google applications such as Chat, Hangout, Drive and Sites were used by the OWS and Fashion Blogging teams, and phone conferencing applications helped the geographically scattered Lifelong Learning team meet to discuss strategy and research responsibilities. The OWS team also used a free version of Zotero to assemble their bibliography. Use of these free web-based applications should be encouraged as a way to work around time and distance challenges that research teams face.

## **Legitimizing your project**

As was noted, several teams were challenged to establish their legitimacy and our teams did so by requesting an email from METRO or creating a free email account for their team. This is easier to do when the project is sponsored by an organization which has the resources to provide organization-based email addresses for teams so as to align them with your organization; or a project webpage that provides more information and a list of teams and team members; or pre-written letters on organization letterhead that members can show to potential clients. Another proactive step to consider here is to discuss with teams how to talk to potential clients about the project in order to establish trust. Because librarians have inherent legitimacy within their “home base” institution, they have to re-learn how to address clients without the cloak of legitimacy provided by their institution.

## **Timeframe and Checking in**

Project deadlines were not set up until the second check-in meeting and non-imposed dates were agreed to among the teams. The project lasted six months, from January 18 to June 15, 2012 giving teams enough time to complete all their research to the extent they could and write their report. The two check-in meetings were scheduled to facilitate more communication with and between teams. This proved very helpful. Team members found shared challenges in the early stages and could commiserate and discuss solutions. In addition, participants had widely varied work experience and those with more experience shared helpful ideas and options for overcoming road blocks.

## **Other observations**

The project would prove difficult for students to participate in as this would compete with regular coursework. However, I am interested in whether local library schools would treat this as a special project for credit with some changes that satisfy requirements for courses. METRO is also in a position to provide space for teams to meet and a venue for the presentation of research findings both virtually and in-person, which is not true of all organizations. One alternative may be for teams to focus on producing a report intended for submission to a library publication and/or presentation at a library conference. Also of interest is whether such a project is workable when team members are unable to meet in person at all. Such an experiment would likely hinge on the applicability to a specific research topic.

Librarians and library organizations that are interested in replicating the myMETRO Researchers Project are welcome to contact me to share ideas and outcomes. After all, the goals of broadening and strengthening librarian skills while also creating a positive and helpful impression of librarians can only help our profession and our colleagues. We all need to relearn how to leave “home base” at different stages of our lives and this is an opportunity to do just that.

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# **CAPE CRUSADE: BUILDING THE STEVE BIKO CENTRE'S LIBRARY AND ARCHIVE IN SOUTH AFRICA'S EASTERN CAPE**

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## ABSTRACT

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In Winter 2011, Kenneth Schlesinger received a Fulbright Senior Specialist grant to draft a three-year strategic plan for a library and archives at the Steve Biko Centre in the Eastern Cape, South Africa. Immersing himself in the complex, contested cultural heritage of the country, he encountered both challenges and strategic opportunities in bringing this plan to fruition.

**Keywords:** apartheid, archives and libraries, Steve Biko, cultural heritage, liberation movements, South Africa, special collections

## CAPE CRUSADE: BUILDING THE STEVE BIKO CENTRE'S LIBRARY AND ARCHIVE IN SOUTH AFRICA'S EASTERN CAPE

During Winter 2011, I travelled to South Africa as a Fulbright Senior Specialist for a six-week research project. The Fulbright Program offers short-term residencies to scholars in a variety of fields. Sponsored by the University of Fort Hare (Nelson Mandela's alma mater), I worked with the Steve Biko Foundation ([http://www.sbf.org.za/Main\\_Site/index.php](http://www.sbf.org.za/Main_Site/index.php)) in both the Eastern Cape and Johannesburg.

Steve Biko (1946-1977) was a South African student leader active in the liberation movement of the 1970s [Figure 1]. He is known for developing the concept of Black Consciousness and fostering community empowerment for social change. Unfortunately, Biko was brutally murdered by the police while in detention. However, his tragic death focused worldwide attention on the struggle against apartheid. The Steve Biko Foundation, headed by his son Nkosinathi, is dedicated to celebrating his legacy and political consciousness through programs of education, community activism, and youth empowerment.



**Figure 1. Steve Biko exhibition. ©2011.  
Kenneth Schlesinger. Used with permission.**

The Foundation ambitiously resolved to construct the Steve Biko Centre, a cultural heritage institution based in Biko's hometown, Ginsberg Township (part of King William's Town on the Eastern Cape) [Figure 2]. Purposely situated in the heart of the Township, its mission is to support community education, employment training, and economic development. Consisting of a museum, auditorium, conference center, community garden, Internet café, multimedia lab, and a library and archive, it is designed not to be a memorial but rather a locus for civic engagement, public dialogue, and activism. When I was brought on board, the library and archive still had no content plan, but Foundation staff definitely wanted it to interact and *talk to* the other component spaces.



**Figure 2. Steve Biko Centre. ©2012. Bongi Dhlomo.  
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My task was to design a three-year strategic plan for the library and archive. What had appealed to the Steve Biko Foundation in my selection was not only my background in libraries and archives, but my performing arts experience as well. They sought an individual who viewed libraries in the larger context of cultural assets. Apparently, I was their guy!

Fortunately, I had visited South Africa the previous year for ten days as part of a visiting delegation of archivists through People to People International. Through this incredibly rich and intensive experience, we toured major archives and research collections in the country, and facilitated conversations on the nature of contested collections, repatriated archives, and related issues of preserving cultural heritage. Honestly, I would never have been able to accomplish this Biko Centre project without already having a strong network of archival contacts in place. For further preparation, I reviewed Verne Harris' *Archives and Justice: A South African*

*Perspective* and consulted with international archival specialists and South African scholars at U.S. universities.

Similar to an architect conceptualizing a new space, one's first assignment is to have conversations with all major stakeholders of the Centre. Biko Foundation administration conducted two days of orientation to give me a big picture overview of their mission and programs, process in research and development of the Centre, as well as their ideas and priorities for the library and archive. In my project plan, the first step was to undertake a needs assessment of the local library and education community.

Public library leaders were generous and eager to meet with me. I visited the small local King William's Town Library [Figure 3]. It had limited and dated print resources and only one Internet terminal for use by the librarian. However, it contained a large, heavily-used student lounge containing textbooks and curriculum support materials. East London Central Library, located in the large city near King William's Town, had a medium-sized collection, as well as special collections and resources for people with disabilities.



**Figure 3. King William's Town Public Library. ©2011. Kenneth Schlesinger. Used with permission.**

Further, the Foundation arranged meetings with local representatives from Eastern Cape Provincial libraries, archives, and curriculum administration. Historically home of both the black intellectual and liberation movements, the Eastern Cape is South Africa's poorest Province. Nationwide unemployment stands at 28%, and the student pass rate of 52% on matriculation exams (high school graduation) is the second lowest in the country. Not surprisingly, public school students are greatly underserved by libraries – in many cases, one library will have to serve ten schools. Notably, the majority of residents in the primarily rural Eastern Cape don't have access to libraries.

These administrative meetings were politically charged, so I had to quickly observe and assimilate the business protocols of South Africa. Moreover, there was initial suspicion and distrust of my status as a visiting outsider. I learned to begin meetings by introducing myself, discussing my background and qualifications, and then outlining my project in the most respectful, inclusive, and transparent way that I could.

These strategies, in part, served me well when I scheduled appointments to visit special collections at major university archives. Whereas my previous Fulbright experience in Vietnam encouraged me to declare I was visiting as a representative of the U.S. State Department, there was no receptivity to this in South Africa. On the contrary, there exists considerable suspicion toward the U.S. government – as well as government in general.

Since the mandate in American archives is access and sharing documents, I was admittedly shocked when in several significant instances archivists did not show me original documents related to Steve Biko or liberation movements. After our initial interview, I was directed instead to the public access catalog (which I could obtain online) or printed finding aids. Several questioned the need for the Biko Centre to build

its own archive, and even stated that we were in *competition* with their mission.

On the positive side, some individuals supplied contacts to colleagues at related research collections. Another primary exception was the South Africa National Library [Figure 4], whose previous curator had illegally collected an impressive array of anti-apartheid materials, which were banned at the time. Another leading university collection referred me to an individual who had conducted interviews about Biko with prominent colleagues for a biography she had written. She agreed to work cooperatively with the Foundation to make copies of the audiotapes and transcripts available once she secured releases from subjects. Lastly, colleagues at Mayibuye Archives at University of Western Cape [Figure 5], home of the Robben Island Archive and probably the most extensive collection of liberation materials in the country, not only provided copies of voluminous finding aids, but willingly agreed to share pertinent records by preparation of a proposed Memorandum of Understanding with the Biko Foundation.



**Figure 4. South Africa National Library, Cape Town. ©2012. Kenneth Schlesinger. Used with permission.**



**Figure 5. Mayibuye Archive. ©2010. Kenneth Schlesinger. Used with permission.**

Equally critical to preparation of this project were visits to major cultural heritage museums in Cape Town, Johannesburg, Port Elizabeth, and Pretoria. South Africa is blessed with some of the world's most outstanding museums. In order to contextualize the proposed library and archive within the country's cultural history, it was significant to evaluate how museums interpreted their narratives visually, as well as how successfully they connected to visitors and their local communities. Too numerous to mention and chronicle would be my inspiring sojourns to, among others, the Apartheid Museum (likened to the U.S. Holocaust Memorial Museum) [Figure 6]; Robben Island (where Mandela was imprisoned) [Figure 7]; Constitution Hill (site of a notorious prison, now home to the Supreme Court); Hector Pieterson Museum (13 year-old killed in 1976 Soweto student uprising); Slave Museum; Bo- Kaap Museum (Muslim immigration); and Voortrekker Monument (Afrikaner heritage).



**Figure 6. Apartheid Museum. ©2010. Kenneth Schlesinger.  
Used with permission.**



**Figure 7. Robben Island. ©2010. Kenneth Schlesinger.  
Used with permission.**

After three weeks, I was invited to the Foundation's Johannesburg office to present my preliminary findings to the content team for the Centre. I introduced them to the library and archive's mission statement:

*The Steve Biko Centre Library supports the information and learning needs of the Eastern Cape community and visitors. It provides both print and online cultural heritage materials related to South African history and civilization, Black Consciousness, and the African diaspora.*

*Functioning as a teaching library, it fosters research support, independent learning and student success through public and outreach programs. Further, it is committed to partnering with and supporting the information needs of the other programs affiliated with the Steve Biko Centre.*

*The Archive serves as an onsite and remote resource collecting materials documenting the life, writings, political engagement and community development philosophy of Steve Biko. Materials are made available to local and international scholars to support publications, exhibitions and special projects. The Archive also partners with local schools to introduce students to primary source documents to enhance the curriculum.*

It is critical that the library serves the entire Ginsberg Township community – from children in crèches (nursery schools) to pensioners (elderly). Print materials not only have to represent the range of reading levels – but also the breadth of African culture and civilization. Literacy reinforcement is the foremost priority, followed by the need to promote student success in preparing for matriculation exams. The library should also collect textbook and curricular materials. A related component is to compile a repository of school lesson plans

and curriculum development documents to promulgate best practices for teachers.

Since South Africa experiences pronounced digital divide issues, patrons should be welcomed into the library by ten public access Internet terminals and an opportunity to print documents. Study tables in the central portion of the space would encourage student group work, surrounded by circulating book stacks. The back area would contain comfortable reading chairs, magazines for browsing, display cases for literary or archival exhibits, as well as open space for lectures, readings, and children's groups. Biko Foundation recently informed me they will now construct a separate children's room. Adjacent to this area would be the periodicals stacks and a secure archive reading room.

The project plan also contains an appendix of policies for establishing access and circulation, cataloging software, collection scope, donor and scholar agreements, etc. The intention is to keep annual membership fees or book fines low to encourage widespread use.

The archive provides a more specialized facility for researchers and scholars, documenting Steve Biko's brief life, professional contributions, and political philosophy. In addition to formulating cooperative exchange agreements with related repositories, new collections will be actively solicited. Processing interns could be recruited from the University of Western Cape's Museum and Heritage Studies diploma program. Further, a local history archive of Ginsberg Township will be constructed by community members contributing visual materials, artifacts, and documents.

This physical space will be supplemented by outreach, active programming, and professional training programs. The library should exist as its own cultural center with readings, lectures,

and writing workshops conducted by local authors. The Centre's accompanying computer and multimedia labs can be annexed to facilitate information literacy training, Internet instruction, and classes in website design and Photoshop. Community youth can be trained in multimedia technology equipment to record oral history interviews with community elders that can be used as an archival resource. A proposed bookmobile will travel to outlying rural areas to distribute print books and offer limited access to computer technologies.

Admittedly, the content team had preconceived and fairly traditional notions about how the library could function. Initially, they were surprised by the plan's emphasis on literacy, software training, and cultural enrichment, particularly how the library and archive was conceived to work in tandem with the computer and multimedia labs. One member, smiling, said, "It's not quite what we had in mind, but I think it will work." Then I showed them the budget, which they believed was achievable with additional fundraising.

Before traveling to South Africa, a few leading archival specialists cautioned me about the nature of international archival work, primarily the financial sustainability and ongoing support for implementation of plans once the residency is completed. I was also advised on the limitations of being an outsider, as well as the necessity to quickly grasp the complexities and behavior mores of a different culture. While being intellectually prepared, there's still no comparison with actually being there on the ground.

From my previous experience, I had learned of South African archives' uneasy relationship with their U.S. counterparts – joint digitization agreements where American universities somehow expected to assume ownership of the attendant cultural property. One South African librarian characterized this as *digital imperialism*, as we heard many stories of the *contested* nature of

the nation's cultural assets, notably sensitive materials from the apartheid era.

On the whole, I cherished this unique opportunity to spend six weeks in a fascinating and stunningly beautiful country [Figure 8] with a complex and embattled history. I was proud of my submitted plan – however skeletal – which I believed did justice to honoring Steve Biko's admirable principles of social justice and community leadership. My South African hosts and the majority of colleagues encountered were warm, receptive, and supportive.



**Figure 8. Kenneth Schlesinger at Cape of Good Hope. ©2012. Mayi Custodio. Used with permission.**

However, international assignments always contain their fair share of frustration, setbacks, disorientation, and loneliness. Nevertheless, it was precisely this dislocation that I welcomed because it fundamentally challenged my overarching intellectual concepts, social constructs, and basic cultural biases. It wasn't always easy: sometimes it was shoved in my face, but it ultimately proved rewarding for my personal development, professional contributions, and intimate understanding of my role as a citizen on this planet.

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**PROMOTING INFORMATION  
LITERACY THROUGH  
ENGAGEMENT WITH  
WIKIPEDIA**

**BEN TURNER**

**ST. JOHN'S UNIVERSITY**

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## ABSTRACT

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This chapter describes the use of a Wikipedia critique assignment in a first-year general education course at St. John's University in Jamaica, New York. The focus of the course was on the history of New York City in the early twentieth century. Students evaluated pertinent Wikipedia articles based on factors such as use of references, comparison with scholarly sources, and areas of contention revealed in the talk pages. Overall, the author deems the assignment a success, as students demonstrated that they became more aware of how Wikipedia articles are constructed, the role of documenting evidence in establishing credibility, and that most Wikipedia articles are subject to ongoing revision. The author also identifies ways to make the assignment more effective, such as familiarizing students with common differences between scholarly and popular publications, and giving more practice in close reading and textual comparison prior to giving the assignment.

**Keywords:** wikipedia, history, undergraduate students, information literacy, evaluating information

# PROMOTING INFORMATION LITERACY THROUGH ENGAGEMENT WITH WIKIPEDIA

Wikipedia has caused significant discomfiture among academics and educators, who blame it for undermining traditional scholarly standards of authority. In 2004, the *Boston Globe* wrote an article that praised the accessibility of Wikipedia, but also raised questions about its reliability, noting that “we don’t know the reviewers or their qualifications, just as we don’t know the authors” (Bray). In 2006, *The Educational Digest* bemoaned that Wikipedia “seems far more concerned with quantity and democratic fact-making than accuracy” (Starnes). Professors I work with at St. John’s University often complain that students heavily rely on Wikipedia as a research source.

Despite its detractors, people have long recognized the educational potential of Wikipedia. Many educators counsel their students that Wikipedia is acceptable if used appropriately – as a tertiary source for basic information and ideas for suggested readings on a topic, not as a source in its own right (Claunch, 2011). Others have incorporated Wikipedia into their coursework by having students edit existing entries or create entirely new entries on topics not yet covered (Education/Case Studies). Professor Jennifer Travis, who teaches English Literature at St. John’s University, had her students create entries on various African American novelists of the nineteenth century. In the Spring of 2012, I created an assignment in which students added in-text citations to Wikipedia articles on topics related to early twentieth century New York City history.

Other educators have created assignments in which students analyze and critique Wikipedia articles without editing them, with the goal of students becoming more aware of how to evaluate information. Professor Paula Patch of Elon University had students in an English Composition class review Wikipedia articles for their reliability and appropriateness for college-level research (Patch, 2010). Students reviewed articles on topics from class readings, exploring questions such as “what information on the topic is included?”, “does the entry include references?”, “who wrote the article?” and “what are people discussing [on the talk page]?” Patch concluded that the assignment was successful, as her students learned the importance of evaluating the “authority, accuracy, and currency of potential research sources” (Patch, 2010, p. 282).

## **The Assignment**

In the Fall of 2012, I adapted Patch’s assignment for a first year course called Discover New York, which is a general education course required of all freshmen at St. John’s University. Professors are given a wide degree of latitude in teaching Discover New York, and they usually approach the course from the standpoint of their subject expertise. Since my academic background is in twentieth century United States history, I decided to focus my course around the New York City History, 1900-1940. Students would analyze Wikipedia articles from a central question: is the article appropriate for college-level research? Specifically, students would focus their criticism on factors such as outline and organization, the quality of references, comparison to course readings, and the article talk pages.

Rather than give students relatively free reign to choose their own Wikipedia articles to critique, as Patch had done, however, I pre-selected articles that were relevant to the course

content, had notable flaws, and featured lively talk pages with significant disagreements related to substance. Preselecting pertinent Wikipedia articles would have the added benefit of helping students learn relevant course material.

To help students make informed criticisms of their Wikipedia topics, additional readings were provided on each topic from scholarly sources, which were placed on electronic reserve. Students who critiqued *Ku Klux Klan* (Ku Klux Klan 2012), for example, would read sections from Kenneth Jackson's *The Ku Klux Klan in the City, 1915-1930*. Those who critiqued the article about *Eugenics* would read from the book *Inheriting Shame: The Story of Eugenics and Racism in America*, by Steve Selden. The goal was for students to not only learn how to approach information more critically, but to deepen their knowledge of the chosen topic through a careful comparison of different texts.

## Results

The student critiques of Wikipedia were generally strong, though there was room for improvement in all areas.

### Outline and organization

A common criticism of Wikipedia is that its articles are poorly structured and confusing compared to more traditional reference sources (Giles, 2005, p. 901). Somewhat surprisingly, however, students' feedback on the organization of the Wikipedia articles was generally positive, with several students remarking that the "Contents" box at the top of the page provided a clear indication of the article's layout. Others observed that their articles were arranged chronologically, such as the article on *the International Ladies Garment Workers' Union* (International Ladies, 2012).

On the other hand, several students pointed out inconsistencies in layout. One student described how in the article on the *Ku Klux Klan*, the sections covering different Klan periods were each organized differently from one another, and that the section on the “Second Klan” includes a description on the “Social Composition” of Klan membership, which is not included in other sections. The “Third Klan” appears as a bullet list of facts, while the sections on the first two Klans are written in normal prose. In another good criticism, a student who critiqued the *Triangle Shirtwaist Factory Fire* article complained that the article did not include a section on the causes of the fire, but proceeded directly from a description of the fire itself to its consequences and legacy.

In at least one case, however, criticism of organization seemed unwarranted. A student who critiqued *Eugenics* (Eugenics, 2012) wrote that the article begins with a discussion of how “the Nazi’s used this fundamental concept of Eugenics to justify what they believed to be the purification of the human race through massive racial extermination. The piece then goes on to comment upon Eugenics being adopted as a modern field of study in the year 1883.” This criticism seems off-base, since the article begins with a definition of Eugenics, then discusses its origins in the late nineteenth century. Such unfounded criticism seems to reflect lack of care in close reading of text, a problem which arose in other sections of the assignment.

## **Analysis of References**

One of the purposes of this assignment was to teach students about the importance of citing sources, not simply as a way to avoid plagiarism but also to establish credibility by properly documenting evidence. Wikipedia’s own rules state that articles must include citations to reliable sources (Wikipedia, 2012), yet any regular user of Wikipedia will encounter articles that do not reflect this ideal. To their credit, contributors to

Wikipedia generally identify articles that require additional citations with appropriate warnings. The article on *Bugs Moran*, for example, states that “This article needs additional citations for verification” (Bugs Moran, 2012).

Not surprisingly, students were most adept at identifying lack of citations when the articles themselves were flagged with such warnings. The two students who critiqued *The International Ladies Garment Workers’ Union* (International Ladies, 2012), for example, remarked that the entire article lacked citations. One student who critiqued *Eugenics* described how there were “[citation needed]” flags throughout the entry. In other cases, students identified sections of articles lacking references without such prompting. Two students reported that various sections in the entry on the *Ku Klux Klan* lacked appropriate citations, including “Refounding,” “Social Factors,” and “Activities.”

Students also provided thoughtful commentary on the quality of sources cited. One student who critiqued *Ku Klux Klan* noted approvingly that it cited Kenneth Jackson’s work, which was assigned for class reading and is a well-regarded text on the subject. Similarly, one student who critiqued the *Triangle Shirtwaist Factory Fire* (Triangle, 2012) remarked on its extensive use of the classic text *The Triangle*, by Leon Stein, as well as *Triangle: the Fire that Changed America*, by David Von Drehle, the latter of which had been assigned as a class reading.

Students also made intelligent inferences about the quality of sources with which they were previously unfamiliar. One student who critiqued the article on *Eugenics* remarked that most of the references came from academic sources, based on from the names of the presses and Web sites with .edu extensions. Similarly, in critiquing the *Triangle Shirtwaist Factory Fire*, one student noted that it cited references from

the *New York Times* and *Chicago Tribune*, as well as Web sites published by New York University and Cornell. While it would have been helpful for the student to provide greater detail about the nature of the Cornell Web site (it is a collection of primary sources related to the Triangle Fire), judging the reliability of a reference based on the reputation of the publisher shows good awareness on how to make a snap judgment on the reliability of a source.

Not all students' work was as insightful, however. For example, one student who critiqued *the Ku Klux Klan* observed that the references "all seem to be from books, articles, websites or encyclopedias," yet no titles were provided and no explanation was given for why these were reliable. In critiquing *Eugenics*, another student remarked that there "are several articles and Web sites referenced throughout the [entry], but very few possess solid information on Eugenics." No explanation is offered as to why these sources are inadequate.

Students also missed at least one instance in which a reference was incorrect. Although three students critiqued the *Ku Klux Klan*, none mentioned that one citation refers to author Charles Quarles, while others refer to him as Chester L. Quarles. Both citations clearly refer to the same person, since the title of the work is the same. Identifying such an error would have provided insight into the errors sometimes found in Wikipedia.

## **Comparison of Wikipedia to Assigned Class Readings**

Students generally performed well in comparing Wikipedia articles to assigned class readings. In critiquing the article on the *Triangle Shirtwaist Factory Fire*, one student made the thoughtful point that the article could have included more information on Frances Perkins in the section on "Legacy,"

since it was through Perkins (who later became Secretary of Labor under President Roosevelt) that many of the labor reforms first implemented in New York State in the wake of the fire became federal laws. The same student also remarked that the article could have said more about how industrial accidents like Triangle continue to occur with alarming regularity in places where labor laws are either absent or laxly enforced. While I am not sure I agree with the latter point, the student's comment shows good awareness of how Triangle remains a rallying cry for advocates of workers' rights.

Not all students compared texts so carefully, however. One student claimed, for example, that the *Ku Klux Klan* failed to "deliver anything" about Colonel William J. Simmons, who founded the "second" Klan, when in fact the article discusses Simmons at length. Another student falsely claimed that *Eugenics* never mentioned its role in shaping restrictive immigration legislation in the 1920's or the role of the American Breeders' Association in popularizing the theory. In fact, both were discussed in the article.

Conversely, there were cases where students failed to detect omissions of pertinent material from the assigned readings. The *Immigration Act of 1924* (Immigration Act, 2012), for example, talks about the law itself and its effects on immigration patterns, but does not provide a very thorough explanation of why the law came into being in the first place. Specifically, the article fails to describe the general change in immigration patterns from the late nineteenth century onward, which saw greater numbers of immigrants on the whole, and a far greater proportion of immigrants from southern and eastern Europe. Nor does the article mention the association of Jewish immigrants with political radicalism, or the deep economic recession of the early 1920's, which stoked fears that immigrants provided cheap labor and unwanted competition for scarce jobs. Without understanding such historical factors,

it is hard to understand the drastic change in American immigration policy in the 1920's. Yet neither of the students who reviewed the *Immigration Act* mentioned these shortcomings.

## Discussion of Talk Pages

Through analysis of the talk pages, students identified areas of contention related to their articles. One student who critiqued the *Ku Klux Klan*, for example, described how the major argument on its talk page was whether the organization should be categorized as left wing or right wing. One individual argued that since the membership of the KKK in the South was traditionally Democratic, it was inaccurate to claim that the organization belonged to the "far right." To buttress the argument, the individual also claimed that prominent civil rights leaders such as Martin Luther King, Jr. were Republican. The dispute was resolved by others pointing out that the scholarly consensus is that the KKK is a far-right organization (four references to scholarly publications were provided), and that the organization's own Web site denounces "the wicked, socialist, new world order."

While the debate on the political ideology of the *Ku Klux Klan* seemed relatively honest, if ideologically charged, students also encountered instances of deliberate misinformation and vandalism. One student described how the section on "Appeal to authority and WP:verifiability," on the talk page on *Marcus Garvey* (Marcus Garvey, 2012) discusses an edit made by the contributor "BlocknTackle" in 2006, who claimed that Garvey sodomized a 12-year-old boy. Other users immediately raised doubts about the claim, pointing out that *Google* searches produced no mentions of Garvey ever being accused of child rape. Another noted that BlocknTackle had made similar explosive and unfounded claims about other prominent black leaders such as Malcolm X. Wikipedia contributors deleted

BlocknTackle's claim about Marcus Garvey when they determined that the reference provided to verify the claim - a book supposedly by one "Harvey Hancock" titled *Heart of Darkness* and published by Lippincott - was fabricated. No such book exists.

The lessons to be drawn from such cases are ambiguous. On one hand, they demonstrate the vulnerability of Wikipedia to those with dishonest intentions. However, the swift action taken to correct misinformation shows that the Wikipedia community is vigilant persevering the integrity of the site. BlocknTackle's claim about Marcus Garvey was deleted on the same day he entered it – January 9, 2006.

Not all the talk pages were as contentious, but they still afforded students insight into how disputes are resolved on group-authored Web sites like Wikipedia. For example, one student described how the *Triangle Factory Shirtwaist Fire* initially claimed that 148 people died as a result of the fire, but that this number was later revised to 146. The student also noted that the article had claimed the fire was the "deadliest disaster in New York City history," but that this was corrected in light of the sinking of the General Slocum in 1904, in which 1,021 people died. Another student wrote that subsequently, the entry changed its designation to "worst industrial accident in New York City history."

Students had apparent difficulty connecting issues raised on the talk pages with edits made to the entries themselves. Two students who critiqued *Eugenics*, for example, described how much of the conversation on the Talk page related to the opening section of the entry, which many thought was too long and did not provide an effective summary of the topic. In response to these criticisms, users made several suggestions on the talk page of how the opening could be worded more succinctly, with others offering further refinements to the

suggested rewording. The *Eugenics* talk page provided an excellent example of how Wikipedia functions at its best – a collaborative and supportive environment where people make a good-faith effort to broaden public knowledge. The suggested edits were implemented around the time of the discussion, in January, 2012.

Despite this, one student who critiqued *Eugenics* said that none of the issues raised on the Talk page “have been resolved.” This suggests that not all students are aware of how Wikipedia articles are subject to ongoing editing, and that the assignment should be revised to include some discussion of version history to show how articles change over time.

## Reflection Papers

As a follow-up to this assignment, students wrote short in-class response papers in which they were asked questions including: what was the purpose of the assignment? What was the most important thing you learned from the assignment? Have your thoughts changed about using Wikipedia as a source for research projects?

Students showed a good understanding of the overall purpose of the assignment, which was to train them in the art of evaluating information. One student noted, for example, that the purpose of the assignment was to “get a better understanding at being able to analyze the effectiveness and accuracy of Internet information.” Another wrote that “the purpose of the assignment was to teach us “how to check for valid sources for research papers and how to determine what cites [sic] are the most accurate.”

Responses to the second question showed that students gained insight into the workings of Wikipedia by completing the

assignment. One student noted, for example, that she had never really looked at the references to a Wikipedia entry before completing the assignment, and that she had been unaware that each entry had its own talk and history page. Another student suggested she had learned the relationship between proper documentation and reliability, noting that “the sources are really important in any writing that a person does; whether online or on a research paper.” I could not have said it better myself.

On another positive note, the assignment seemed to make many of the students more distrustful of the information they consume. One student wrote, for example that “Wikipedia is not accurate, and should not be used as a research source.” Others implied that the assignment had changed their opinion of Wikipedia for the worse, and that from now on “I will try avoiding using Wikipedia for any assignments.” Another student showed a greater skepticism of all information, remarking that “one should always question what he or she reads. Nothing should ever be accepted as solid truth at first glance.”

Almost all the students concluded that Wikipedia is not a suitable source for college-level research. Some students said that they would use it for quick information on topics of personal interest, and at least one student mentioned using Wikipedia as a primer for research, since “it is a good place to go to find potentially relevant and credible sources.” Others noted significant flaws with Wikipedia, such as authors who have no credentials or training in the subject area, and the presence of deliberate misinformation in some of the articles. While some said that the assignment had only confirmed their negative opinions of Wikipedia, others changed their minds based on the assignment. One student wrote that “the Web pages many of us used as children and believed to hold profound truths can mislead us.”

## Discussion

Overall, the Wikipedia critique assignment was a success. Although many students reported a greater appreciation of the shortcomings of Wikipedia, more importantly, they demonstrated a greater understanding of how to approach information critically. Through this assignment, students provided intelligent criticism of the layout and organization of Web sites, the references, or lack thereof to substantiate claims, and omissions of important content in Wikipedia pages. Students gained a greater understanding of the areas of contention through analysis of the Talk pages associated with Wikipedia articles.

Although this assignment was generally successful, there are ways in which it could be improved. To elicit better responses regarding the types of sources cited by the Wikipedia articles, for example, it would be helpful to make the questions more specific, such as asking them about the nature of the sources cited and if they are mostly popular or scholarly. Having them conduct basic research on sources cited might also be helpful in improving their feedback in this area.

The pre-selected list from which students can choose an article to critique could also be improved. Most of the selected articles were well-suited to the assignment, as they had obvious flaws on which students could hone their critiques, as well as lively Talk pages where students could gain insight into the often contentious process of knowledge creation. The article on the *International Ladies Garment Workers Union* lacks an interesting Talk page, however, and should no longer be included as an option for the assignment. *Eugenics* should also be replaced with the article *Eugenics in the United States*, which is more directly relevant to the class material, and which has a more contentious and interesting talk page. *The Triangle Shirtwaist Factory Fire* should also be discarded as an option,

as it is relatively free of serious flaws and lacks serious debates on its Talk page.

Finally, since this assignment was relatively unfamiliar to the students, it would be helpful in the future to give in-class practice activities prior to the assignment. Students might be given short writing assignments in which they analyze the Talk page of an assigned Wikipedia article, for example, or evaluate the references of an assigned Wikipedia article. Such activities would probably serve to help demystify the assignment and give students greater confidence prior to its undertaking. Like Wikipedia itself, using the “Free Encyclopedia” as a teaching tool is a work in progress, and will require ongoing revision and improvement.

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Wikipedia Critique Assignment  
Professor Ben Turner  
Discover New York  
St. John's University  
Fall, 2012

Due: October 17, 2012  
20% of Final Course Grade

The purpose of this assignment is to give you some practice in analyzing and evaluating information.

You will critique a Wikipedia article from the list below, focusing on the general question:

**Is the Wikipedia article credible, and would you think it appropriate to use it as a source for a college-level research assignment?**

Use the questions provided to guide your critique, but feel free to include any other relevant observations that are not specifically addressed by the questions. Just be sure to stay on topic. Your critique should be roughly **1,100 to 1,300** words.

Please also make sure you have completed all relevant class reading related to the topic you choose to critique. Those topics not covered in class, such as the KKK, Jacob Riis, and Bessie Smith, will have additional readings placed on eReserves. Additional reading material will be posted by the evening of **October 3**.

## **Topics**

Use the **Wikipedia Topic Selections** page on the course site (<http://stjohns.campusguides.com/yankee>) to indicate which

topic you have selected. No more than **four** students may critique a given entry.

Rand School of Social Sciences (Red Scare)

Immigration Restriction Act of 1924 (Immigration Restriction)

Jacob Riis (Jacob Riis)

Ku Klux Klan (focus on the "Second Klan") (KKK)

Eugenics (Eugenics)

Triangle Fire (Triangle Fire)

International Ladies Garment Workers Union (ILGWU)

Marcus Garvey (Harlem Renaissance)

NAACP (NAACP)

Bessie Smith (Bessie Smith)

## Focus Questions

### **Article (This Refers to the Wikipedia Article Page Itself):**

How is the information organized? Is the organization effective?

What type of references are used? Books? Articles? Web sites?

How reliable do these sources seem?

Do the sources listed in the bibliography include those assigned for class reading? Is anything missing? Anything included that you were not assigned?

How do the references and bibliography compare to those in the sources you read?

Are there any areas where the author makes factual assertions that are not supported by references?

Is the article missing anything important that you read in the class readings? Describe.

Are there any sections of the article flagged for lack of references or in-line citations? Bias? Cleanup? Describe.

**Talk (This Refers to the Talk Page Associated with the Article):**

What are people discussing?

How have disputes been resolved?

Are the discussions primarily related to *form* or *content*, or a combination of both?

Has the article been vandalized or filled with deliberate misinformation?

Are there any outstanding issues that have not been resolved?

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# **DISSEMINATING MOVING IMAGE WEBSITES WITH A WEB 2.0 CENTRALIZED HUB**

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## ABSTRACT

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Academic librarians support teaching and learning. Media librarians select and acquire media that support and enhance instructors' goals. The use of moving images as a teaching tool is not new, but the ways instructors access them in the digital age continue to evolve. This chapter will include a brief history of the use of media as a pedagogical tool and a study on how one librarian at the City University of New York's largest community college met her college's need for centralizing moving image websites. Most of the websites found within the Moving Image Media Hub, [www.bmcc.libguides.com/media](http://www.bmcc.libguides.com/media), allows one to share, embed, mashup and/or remix, and even [legally] download as one sees fit. The media can be incorporated into syllabi, program or faculty websites, or learning management systems like Blackboard. This Moving Image Media Hub is not password protected, so others outside her college may access this LibGuide, making it a global resource.

**Keywords:** clip, digital, documentary, download, education, embed, film, learning aid, LibGuides, mashup, media, moving image, online, open access, open educational resource, remix, share, teaching tool, tutorial, Web 2.0

# **DISSEMINATING MOVING IMAGE WEBSITES WITH A WEB 2.0 CENTRALIZED HUB**

## **Introduction**

Throughout the ages, humans communicated, taught, and learned through storytelling predominately using their aural and visual senses. Think of a mammoth hunter recounting his latest foray around the home fire or the lessons of Cro-Magnon culture portrayed on sacred cave walls. Move forward a few hundred thousand years and we still communicate, teach, and learn using our two primary senses of sight and sound. Until recently, these lessons were confined geographically. In this digital internet era of computing, we have new tools like online moving image websites to disseminate our cognitive conquests. We can now capture, view, and share our collective wisdom from anywhere in the world—defying manmade boundaries, giving all equal access to local knowledge globally. This chapter will outline one media librarian's role in fulfilling our ancient need to understand our present, remember our past, and ponder our future, using moving images as a teaching tool. It will cover where we were and where we are headed as technology continues its evolution aiding humans to communicate, teach, and learn.

## **Brief Media History**

As academic librarians, we support the efforts of teaching and learning. Media librarians select and acquire media, or moving images, that support and enhance instructors' goals. Following Marshall McLuhan's famous declaration that "The Medium is the Message," we put the media in or at the 'hands' of those

who need it. It should be noted that McLuhan's definition of *media* was broad ("any technology that ... creates extensions of the human body and senses" McLuhan 1995, p. 228). His philosophy focused on the method in which the content got to the user, not the actual content. Though media librarians carefully select the contents of our collection, we now need to concern ourselves about the delivery mechanisms of our moving images as well. In a sense, modern day media librarians shifted their efforts to a more McLuhanian focus.

The use of moving images as a teaching tool is not new, but the methods that students and teachers use to access them in the digital age change over time. Each step in evolution brings forth a more complex system. Humans distinguish themselves from other animals with the use of tools, the development of language and societies, and the use of storytelling for communicating, learning, and teaching. Storytelling also evolved through the ages from cave painting and oral history to writing and photography to the use of moving images. From the first flickers of the early film reels to today's digital cameras, tablets, and smartphones, we continue to communicate, teach, and learn through moving images. In this context, where do media librarians fit in?

There are numerous reasons for using moving images as a teaching tool. Like the old adage, 'a picture is worth a thousand words,' moving images relay so much more. What better way to have nursing students learn phlebotic techniques than to show them a close-up video of an expert finding a vein with a needle? Or the proper lip and tongue positions to teach ESL students how to pronounce the English 'th' sound? And what better way to teach theater students the changes of delivering Shakespearean soliloquies over the decades? All academic disciplines can benefit. There are theories of teaching that propound educators should change the classroom pace every fifteen to twenty minutes to maximize interest for both the

students and themselves (Jones, Peters, & Shields, 2007, 36). One of these ‘change ups’ frequently is showing a moving image. This may prove a good choice since like their Cro-Magnon predecessors, most of today’s millennial students and digital natives attain and process most of their information visually and aurally (Friedman, 2008, p. 11). Sherer and Shea inform us that today’s students “have been connected to the new technology throughout their development” and they “expect that teaching and learning will be more interactive, collaborative, and experiential...” (2011, p. 56).

Soon after movies became the preferred entertainment in the early 20<sup>th</sup> century, academics started to explore how these celluloid wonders could be used in the classroom. L. Paul Saettler, an education technology historian, tells us that using media technology grew out of the audiovisual movement in the 1930s (1990, p. 9). Progressive higher education instructors thought that using media such as slides and films delivered information in more concrete and effective ways than lectures and books did (Doering, 2010, p. 6). In 2009, Butler, Zaromb, Lyle, and Roediger repeated experiments of early teaching pioneers (such as Sumstine in 1918; Weber in 1922; Wood & Freeman in 1929, and Hansen in 1933) who looked at moving images as a teaching tool. They found that the costs and benefits of using popular films as an instructional aid enhanced learning and retention of associated texts (2009, p.1162). These results fly in the face of those who continue to deride showing films as lazy teaching.

## Librarianship

For media or audio/visual librarians, the evolution of our media collections began with slides for carousel projectors. Though these classically are not moving images, an instructor may flip between two or more slides showing contrasts or differences of

a certain element making the intended learning target ‘move.’ The next stage in our collecting evolution was reel-to-reel films. Those of us of a certain age have vivid memories of our chair desks being parted like the Red Sea to fit the big movie projection cart and listening to the male narrator while watching the flickering black and white images in the darkened classroom. Following the reel-to-reel, the Elmo-type document projectors were a classroom staple. These again showed static images (much like carousel slide projectors) on cels or transparencies, which could be erased and reused for different topics. Some companies sold cel packages that libraries cataloged and stored. Once again, to make these ‘move,’ instructors had to flip between cels to drive home a point they were making. There was a very brief time (c.1986-1989) when LP-sized laser discs were considered the upcoming technology of moving images. However, these discs and their players were too costly and never gained popularity in the United States. In the very recent past, the use of videocassette tapes to play in VCRs became the industry standard. This rather affordable mode of moving image media lasted over twenty years. However, the brittle plastic VHS cassettes suffered misuse and the film itself was prone to tangle in the VCR easily. Another drawback for VHS tapes was they took up quite a bit of storage space.

From the late 1990s until today, the DVD took over as the reliable medium on which all moving images are sold and stored. These digital marvels are durable, slim for storage, and are reasonably priced for libraries to continue building their media collections. However, there is one thing that all these media, including the DVD, have in common. In order to use them, instructors needed to get either a specific title and/or the projector to play it in class. This means instructors had to take time to fill out a form, pick up the media (DVD/VHS), and pick up its player. After showing their students, they then need to return the media and its player back to their respective

departments. During this entire evolution of media collected by libraries, instructors always needed to interact with humans to get a moving image for class use. This was fine but all humans are prone to make mistakes and there were all sorts of mishaps—on the instructor’s end, on the library’s end, on the audio/visual department’s end, and on the transportation system’s end if the media title is not locally owned, making it an interlibrary loan request. This is where the era of pure digital media excels. The instructor can now research, access, and share moving images on their home, office, or classroom computers.

Given this history of media and librarianship, what does it mean to be a global media librarian? To find out, we first need to look at the origin of the globalization movement in education. In a book about study abroad, Hans Schattle tells us that ‘global citizenship’ has cosmopolitan roots and has been a principle in higher education in the United States since the 1990’s (2009, p. 3). He later tell us that the goal of global educators is to “render their students competitive in the international economy,” while “instilling awareness and empathy of other countries, cultures, and issues of common concern across the planet” (2009, p.6). Many colleges and universities initiated offices and administrative positions that focus on global education throughout the curriculum, and reflect an institution wide commitment to its central importance in 21<sup>st</sup> century higher education (Kutner & Armstrong, 2012, p.6). Being librarians, Kutner and Armstrong state that as a “profession and as educators, librarians have an important role to play” (p.25) and we take part by producing information literate students within the 21<sup>st</sup> century global societal context. Academic (media) librarians are integral in the global education conversation. They conclude that the Association of College and Research Libraries (ACRL) Information Literacy Competency Standards for Higher Education are not sufficient to “facilitate teaching of twenty-

first century.” Though Kutner and Armstrong do not specifically use the words *computer*, *internet*, or *online*, they think these standards should include “additional content-based engagement with the social, cultural, economic and political contexts of information access, retrieval, use, and creation” (2012, p. 25). Given the ubiquitous use of computers and the internet in traditional face-to-face, hybrid, or distance learning classes, these course formats are an integral part of information literacy in higher education. Sherer and Shea caution that the major challenges still “lie in harnessing the potential of these expanding resources [i.e., online videos] as learning tools” (2011, p. 58).

James A. Buczynski, a Canadian reference librarian, made the argument in his 2009 paper that “compared with competing information portals, library web sites lack substantial video clip content” (p. 37). Arguing in favor of video via screencasting technology, he states, “instructional video on demand offers speedy learning when you need it” (p.38). For Buczynski, when it comes to the medium offered, patrons just want access (2009, p. 41). In this fast-paced information age, patrons/academics tend not to spend a lot time investigating which website would be best for their needs. It is the author’s contention that both the quality of the media and its delivery mechanism are equally important in this digital age. Just as the boundaries between creators and audiences have blurred in the personal and participatory media age, the way media librarians get quality media to their users is no longer cut and dry. The patrons just want it by any means.

Media librarians are in a constant battle to keep their share of the ever-diminishing library budgetary pie yet the number of excellent moving image websites grows continuously. Though Burke, Snyder, and Rager’s 2009 article focused on assessment by faculty using YouTube as a teaching resource, they point out that “YouTube is a free teaching resource for faculty,

which is an important consideration for educational budgets.” This author’s grant funded project of compiling online moving image websites for use in higher education began when several faculty members asked for recommended non-YouTube internet video sources. (They did not want the advertisements that most YouTube videos have). The media librarian at the City University of New York’s largest community college met her college’s need for a centralized source of moving image websites using LibGuides (SpringShare), a powerful and well-supported content management system. An online hub would need to be intuitive, succinct, user-friendly, and descriptive. LibGuides allowed a busy public university community college librarian to create a successful teaching resource of moving image sites to fill a void in her college’s pedagogical toolkit.

Answering her subject professors’ inquiries for online non-YouTube videos began with finding excellent online documentary sites such as DocumentaryHeaven.com, DocumentaryWire.com, TopDocumentaryFilms.com, and WatchDocumentary.com. These all offer full-length quality documentaries on a myriad of topics. Though these sites are good for most of our academic departments’ offerings, they are not useful for all. The hunt for more relevant online moving image websites continues. In this digital age, the author feels the terms movie, video, or film are passé. The term *moving image* sufficiently covers the past, present, and future of this ubiquitous teaching tool.

To qualify for the Moving Image Media Hub, the moving image websites had to fit the criteria of the combined definition of “moving image” from the *Museum of the Moving Image* in Astoria, Queens (NY) and the *Association of Moving Image Archivists* and be shareable and/or easy to view digitally. This definition of a *moving image* is any “stage of producing, promoting, and exhibiting motion pictures, television, and digital media from pre-cinema optical toys to 21st-century

digital technology” (including video and computer games) and recognizes them “as important educational, historical, and cultural resources.” By expanding the definition to include digital technology where one may move either as an avatar or as a spectator within the site, this media librarian quickly learned that the more she looked for quality moving image websites, the more she found, and continues to find. Most of the moving image websites on this hub are either suggestions from colleagues and faculty or found by doing extensive research for news, museum, academic, art, and research websites for moving images. The accumulated bookmarked websites grew to well over two hundred before the grant was secured for assembling them in the centralized hub. As with any grant-funded project, one hopes that once the project is proved a worthy and viable one (by use of user metrics), that it would become a line on either a departmental or a college budget. Otherwise, three fates await a well-used but unbudgeted project: It will just die, it will be migrated to another (free) platform at the same institution, or it could be ‘adopted’ by a sister college stripped of its creator’s name and home institution.

## Technology

Technology is the ultimate zeitgeist. In one of a series of interviews in the *New York Dramatic Mirror* newspaper, dating from March 1913 to April 1914, entitled “Evolution of the Motion Picture,” Thomas Alva Edison said,

Books will soon be obsolete in the schools. Scholars will soon be instructed through the eye. It is possible to teach every branch of human knowledge with the motion picture. Our school system will be completely changed in ten years.

We have been working for some time on the school pictures. We have been studying and reproducing the life of the fly, mosquito, silk weaving moth, brown moth, gypsy moth, butterflies, scale and various other insects, as well as chemical crystallization. It proves conclusively the worth of motion pictures in chemistry, physics and other branches of study, making the scientific truths, difficult to understand from text books, plain and clear to children (Smith, 1913, July 9).

This Edison quote resonates still in the second decade of the second millennia. It took another hundred years with our smartphone, tablet, and Wi-Fi internet era to make his prescient bravado come true. In his book, the *Tower and the Cloud: Higher Education in the Age of Cloud Computing*, Richard N.Katz writes that “the connectivity associated with networks and the mobility associated with modern computing and storage devices have made “being digital” irresistible, telephony, television, film, music, and video have raced to become part of an interconnected landscape that could only be characterized as a lifestyle” (2008, p.10). Joichi Ito, the head of M.I.T.’s Media Lab, wrote in a December 2011 *New York Times* article that the “internet isn’t really technology. It is a belief system, a philosophy about the effectiveness of decentralized, bottom-up innovation.” He posited that the spirit of the internet is that “everyone should have the freedom to connect, to innovate, to program, without asking permission.” The crux of Ito’s argument is that education is not about “centralized instruction anymore; rather the process establishing oneself as a node in a broad network of distributed creativity” (2011). This is exactly how instructors and students should approach and use the author’s Moving Image/Media Hub. Since there is no need to sign in for off-campus access, anyone has the freedom to connect to this resource.

Katz, an academic turned entrepreneur, states that ideally an open educational resource (OER) should be an “environment that allows different users (learners and creators) to communicate with each other” and that access should be ubiquitous (2008, 165). In this same volume, Philip Goldstein advocates the need for institutional CIOs (Chief Information Officers) to be proactive strategists (2008, 242). Information and access to it is the blending of a library’s task with technology. However, too many academic libraries are a separate entity from their institution’s Information Technology (IT) department. These two departments have similar goals but different cultures in approaching these objectives. Most librarians ‘get’ what IT does but IT still do not understand what academic librarians do or their level of education. Unfortunately, most people still think librarians read all day and occasionally shelve books. This is not so. Libraries and IT departments each have their own culture and each should respect each other’s ways of approaching routine tasks, training, and problems differently. Schein defines *organizational culture* as the

[P]attern of shared basic assumptions that was learned by a group as it solved its problems of external adaptation and internal integration, that worked well enough to be considered valid, and therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems (Schein 2004, p. 17).

Ahead of her time, when the City University of New York’s Brooklyn College renovated their library its chief librarian, Barbra Higginbotham, insisted that the library be the home of both academic and administrative computing. She saw the need to combine the source of information with the source of its electronic dissemination. This decision was important since

[T]he institutions information system is increasingly the means by which the institution regulates the boundaries and conditions of its community, the rules of community engagement, and the boundaries, scope, and nature of that community's access to scholarly resources. These are issues that are initiated in and enforced by IT, but again, they are not IT issues (Katz 2008, p. 24).

The library director of Catawba College, Steve McKinzie, speaks of these 'organizational mergers' need to "[combine] their shared commitment to the effective management of information and the library's increased dependence on digital resources" (2007, p. 340). He cautions that it is local campus conditions and personal leadership that drive the creation of successful mergers (McKinzie, p. 342), so what works well for Brooklyn College may not work at another college within the same university. In a paper presented to the International Association of Scientific and Technological University Libraries (IATUL) in 2009, Professor Cribb states it is possible to have a 'melting pot' of library and IT cultures. His one caveat was that "in a mature organization" it would be harder to change things, because of the 'old dog, new tricks' adage. In 2011, Brian Sullivan wrote a satirical commentary for *The Chronicle of Higher Education* entitled "Academic Library Autopsy Report, 2050." Of the six key factors he gave as the cause of the academic library's death, the fourth one was "libraries and librarians were subsumed by information technology departments." Until such an idyllic department comes into being, academic librarians will continue to search and innovate around their 'conditions' and shoestring budgets. (Though this type of initiative may well be a reason why Katz' 'campus conditions' will continue to be fiscally conservative.) It was under this umbrella that the author's Moving Image/Media Hub project using the LibGuides began to take shape.

SpringShare's LibGuides is one of the best and well-priced platforms used throughout the world for libraries to share knowledge and information. As of December 2012, there are over 309,000 guides in use in over 3,700 institutions worldwide that use LibGuides. This platform allows non-geek librarian educators to create and publish customized information sources, course/subject guides, and sophisticated web portals. Just as important, they make it easy to track each segment within each of their guide(s) with usage statistics. If needed, each content manager could effortlessly edit, add, augment, or delete any aspect of any segment of their guide from any device that uses an internet browser. Given that this Moving Image/Media Hub is not password protected, the statistics show that others outside her college use this resource as well.

Most of the websites found within the Moving Image/Media Hub allow one to share, embed, mashup and/or remix, and even [legally] download the moving images as one sees fit. The media found may be incorporated into syllabi, program or faculty websites, or learning management systems like Blackboard thus empowering instructors to assign the moving image(s) before or after class, be it a face-to-face, a hybrid, or a distance learning one. Neves and Dooley pointed out that LibGuides is an easy-to-use method of designing subject portals to library resources (2011, p.96). This author posits that LibGuides can open portals to other sources such as the moving image websites found in her Media Guide. This makes the Moving Image Hub global.

## Global Aspects

One question looming about being *global*, does it mean we go out to 'them,' do 'they' come to us, or both? If being global means to make education content open (or any other content

for that matter), then through the evolution of technology, its end users, librarianship, and finally academia we are quite global. In 2010, Bloom and Johnston proffer how the academic library should be involved in promoting the ideas of global education using YouTube to support cross-cultural understanding. They opine that YouTube is not just “filled with frivolous home videos” (2010, p.116). It empowers people by creating global connections. Building on this idea, at the 2011 International Conference of Education, Research, and Innovation (ICERI), Professors Mayoral, Flores, and Gonzalez from the University of Colima, Mexico gave a presentation on how YouTube and the “internet [are] the perfect path to promote intercultural relationships and facilitate autonomy in learning” English as a second language (p. 2543). Extrapolating on this, there are countless other non-YouTube moving image websites that foster global bonds and stimulate learning. Many of them may be found on the author’s Moving Image/Media Hub.

Amongst the various styles of learning (kinetic, aural, verbal, visual, linear), visual learning style dominates how most of today’s millennial and digital native students attain and process their information. In his two-part article series, “Cool engagements with YouTube,” James Trier talks of the “pervasive role that media plays in society” and how when students participate in a ‘cool hunt’ on YouTube, they actively involve themselves in their own education. Students become a part of the process of discovery rather than being a passive spectator (2007a, p. 408). The premise of Bloom and Johnston’s work is the idea of the teacher as the primary source of information is “a relic of the past” (2010, p. 113). Trier likes the anytime, anywhere aspects of the online video phenomenon, so his students may search and access their assignments when and where they wish, making them yet more in control of their own learning. Trier points out that YouTube’s “immediacy and availability” lets him introduce

new authors to students by showing them selected YouTube videos reading their work or being interviewed. This saves time and expense of requesting similar materials on DVDs (2007b, p. 601). Though Professor Trier's classes focused their searches to YouTube, the number of online moving image sources has grown exponentially since his 2007 writings.

In their article about moving from media consumption to media production in the classroom, Ching-Chiu and Polaniecki said of YouTube, "What began as entertainment had turned into a legitimate educational experience" (2008, p. 95). The flexibility of using videos from online moving image websites is instructors' newest best friends. The beauty of using online videos as an open educational resource is that they be watched before their next class as part of preliminary background, or they can be viewed as a group then discussed in depth led by the instructor immediately afterwards, or they may be a homework assignment. It does not matter if their class is a traditional face-to-face one, or a hybrid class that meets fifty percent in person and fifty percent online during the semester, or the purely digital experience of an e-learning course. Bloom and Johnston found the asynchronous nature of YouTube and other online media websites to their liking since one may replay the clips several times when and where one needs (2010, p.118). Schneps, Griswold, Finkelstein, and McLeod found that using videos to build learning contexts online makes the learning experience less of a linear progression and more "malleable and fluid" one "subject to more influences" (2010, p. 1119). Ching-Chiu and Polaniecki found that "no matter what level of engagement with media they have as consumers or creators of mass media, individuals must develop the ability to analyze and critique social conditions as represented through the digital form of media text and to question and examine the semiotics underlying various social practices" (2011, p. 96). Online moving image media permit students all over the world to participate in a global exchange.

Over 12,000 teachers from 32 European countries participated in a survey about the ways in which the school culture supports creativity during 2009, the 'European Year of Creativity and Innovation.' They all thought that creativity is applicable to every school subject and that both teachers and students can be creative. Though an overwhelming majority of those polled said they use the internet to search for teaching material, a third said they think the use of videos is an important technology to utilize for creativity (Cachia, et al., 2009, p, 14). The use of virtual learning environments and online free material came in fourth and seventh respectively (2009, p. 14). Those surveyed felt there are many untapped online media and digital applications that "most students use extensively outside of the classroom" that may have creative and learning potential in their classes.

One other global aspect of moving image websites is that it connects poorly served students with educational challenges using today's technologies (Van Hook, 2006). Born in the digital era today, any student, anywhere, somehow quickly understands and knows how to navigate practically any smartphone, laptop, or tablet given to them within a short period of time. It seems there may be a parallel of how humans are 'prewired' from birth to learn language to how they know their way around the newest technologies. Case in point is the "One Laptop Per Child" program (OLPC) founded by Nicholas Negroponte. This program gave tablet PCs to children in Ethiopia who have no access to schooling. The children were given sealed boxes containing tablets that were preloaded with educational software and a memory card that could track how the kids used their new technology. These children not only taught themselves to read without teachers by using the Motorola Xoom tablets provided, but they also learned how to hack the Android system as well. In an October 2012 interview in *MIT Technology Review*, Negroponte and OLPC's chief technology officer, Ed McNierney, tell this remarkable story,

We left the boxes in the village. Closed. Taped shut. No instruction, no human being. I thought, the kids will play with the boxes! Within four minutes, one kid not only opened the box, but found the on/off switch. He'd never seen an on/off switch. He powered it up. Within five days, they were using 47 apps per child per day. Within two weeks, they were singing ABC songs [in English] in the village. And within five months, they had hacked Android. Some idiot in our organization or in the Media Lab had disabled the camera! And they figured out it had a camera, and they hacked Android.... Kids had gotten around OLPC's effort to freeze desktop settings. The[y]had completely customized the desktop—so every kid's tablet looked different (Talbot).

## **Future**

Oblinger and Lombardi state that, “technology has changed the way learners see themselves and their futures” (2007, p. 389). After talking about the participatory culture and multimodal interactions, they elaborate that this global economy has us reexamining our educational practices. In line with the learning theory of ‘distributed cognition,’ developed by Ed Hutchins in the mid-1980s, Oblinger and Lomabardi state that “networked technologies make it possible to marshal the collective intelligence of many, irrespective of time or place” (2007, p. 391). Moving images, media librarianship, and its global aspects will continue to evolve. As media specialists, we will continue to trowel for any system or method that delivers moving images to both our local and global patrons.

In our litigious country, there is concern about copyright law in an academic setting. What is permissible and what is not? In a landmark case in California, a decision handed down on

October 3, 2011 in a lawsuit against UCLA filed by the Association for Information Media and Equipment (AIME) and Ambrose Video Publishing found the university did not violate copyright law after purchasing DVDs and then uploading them to stream online for their faculty and students to use in courses. This case has interesting implications for the academic use of moving images found on internet websites and how they are shared (Parry, 2011).

Online moving images will excel in a few new trending learning movements. On the e-learning front, the newest movement is 'snack learning.' These are "bite-sized" tidbits of information you can grab on the go. They are meant to be consumed in a few minutes, when you have a five-minute break between meetings or need a quick tutorial on how to run a software program. Snack learning is convenient, and ideal for brushing up on an old topic or learning the basics of a new one. They are tailored for all sorts of learners, from those with short attention spans to those who want to add to their vast knowledge base. Multimedia based and visually driven, these snacks use moving images extensively. Learning snacks are "perfect for additional reinforcement, quick tutorials, and the immediate assistance that the workplace demands" (Kovach, 2012).

M-learning (mobile learning) using one's smartphone or tablet and their apps is gaining acceptance in the classroom. This is related to the BYOD (bring your own device), movement, which is growing in the public and private sectors. Many companies and schools are adopting this policy since on the surface it seems more cost effective and encourages people to keep working. Its downside it is that it is a headache for IT because of security risks (Kovach, 2012). This brings us back to the need for merging of sources of information (libraries) with the Information Technology (IT) departments. Technology and how it is used in learning will continue to

evolve. Librarians will always keep pace with how learning materials get into the hands and minds of their patrons.

However, the future may not always be tech filled. There are advocates of non-tech teaching and learning methods. A lecturer from Saint John's College wrote, "I was spending a lot more time with the "interface" than I had bargained for, and it was compromising my face-to-face teaching" in a February 2011 article for *Chronicle for Higher Education* (Marshall). Professor Sharon Marshall declared that "the flip side of technophobia is the kind of unexamined technophilia that welcomes everything new and different, whether or not it improves life or teaching, or the lives of students and teachers" (2011). She is still looking for the best of both worlds.

One important question that librarian, Gregory Mitchell tries to answer in his article about multimedia and the library is why put all this in the library. His answer is that because libraries are more than warehouses of books and periodicals, they are essential in the process of instruction, academic research, and communication. In a college or university, the library is not in any one department or college's turf. The library is a central and neutral location that is open many hours each week. The extra-added bonus is that librarians have a professional ethic that drives them to provide instruction and they constantly investigate how to better the services that the library offers (Mitchell, 2005, p. 34). Whether we go to the patrons or they come to us digitally, the internet gives us unprecedented entry to the global arena. This especially holds true for moving images as we continue to evolve and learn from each other around our internet global hearth.

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# INTERNATIONAL PARTNERSHIPS - CASES AND WORKING EXPERIENCE

XIN LI

CORNELL UNIVERSITY LIBRARY

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## ABSTRACT

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Globalization is now a main strategy for many universities. Libraries need to re-think how our programs and services respond to this development in our parent institutions. This article describes four partnership cases with libraries in China and Taiwan: content and expertise sharing, partnership on processing, staff exchange, and information sharing. Drawing on personal experience from working on these cases, the author discusses the partnerships in detail, lessons learned, important skills global librarians need to have, challenges U.S. research libraries face, and raises questions to encourage dialog about finding solutions.

**Keywords** International librarianship, library partnership, international collaboration, global librarian, global librarianship, library globalization, library partnership in China, library partnership in Taiwan, librarian working in East Asia, university library, academic library, case study.

## INTERNATIONAL PARTNERSHIPS - CASES AND WORKING EXPERIENCE

It seems every profession is going global. A search in library literature returns numerous articles about libraries around the world working for common causes, such as open access, digital preservation, and information freedom. Few, however, discuss cases involving joint international efforts to enhance library's ongoing programs and services. The goal of this article is to share personal lessons learned from working on partnerships that have been implemented at Cornell University Library in the last three years.

In the higher education sector, internationalization is becoming a main strategy. It is no exception at Cornell. Recently, the University charged a task force to take a closer look at Cornell's effort and standing in this particular area. Internationalization, as defined by this task force is, "... a commitment, confirmed through actions, to infuse international and comparative perspectives into teaching, research, and engagement. Internationalization goes beyond the availability of international studies or engagement activities. It is an ethos and vision to bring the world to Cornell and Cornell to the world. (Barrett et al., 2012) Creating library services that align with the institutional direction is critical.

Like many peers, Cornell University Library ("Cornell" hereafter) has a long history of international collaboration. Some examples can be found on our library's website: [http://www.library.cornell.edu/aboutus/partners/Global  
Engagement](http://www.library.cornell.edu/aboutus/partners/GlobalEngagement). A number of library staff work on international collaborations in different capacities. My work in this area began in 2005. At first, I was asked to meet visiting Chinese delegations or accompany them on library tours. Over the

years, the nature of my work has evolved. Now my responsibilities include helping my library understand and interpret the culture, context, and environment, identifying opportunities, cultivating relationships, and establishing partnerships in areas that benefit the library. Because of my ethnic background and vast opportunities in China, I have been working primarily with libraries there. As of October 2012, Cornell University has 163 active agreements with international partners, 30 of them are with Chinese partners. (A list of the current international agreements of Cornell University can be found at [http://international.cornell.edu/exchanges\\_current](http://international.cornell.edu/exchanges_current)). I am also charged to explore whether we could replicate our partnership models in China in other East Asian countries.

It is very important to acknowledge that international initiative is a team sport. My colleagues, such as subject librarians, unit library directors, various project leaders and faculty, all play indispensable roles. They inform me about collections, services and research needs. They educate me about project or program details. They practically determine what kind of partnership I should look for. During the exploration, I return to them for fact checking, advice and their assessment of serendipitous discoveries I come across. Routinely, I pass on matters to colleagues whose knowledge or skills exceed my own. For example, a subject librarian would assess the depth and breadth of a partner library's collection or have in-depth discussions about programs in certain subject areas with our partners. When a partnership is established, I hand it off to appropriate colleagues. They become the nurturer and champion of that relationship while I move on to my next search.

The cases below describe partnership work in four different areas. Each is at a different stage of "life". We always hope that all our initiatives would have a long-lasting life, but not all turned out to be the case.

## Case #1: Sharing Content and Expertise

If we asked faculty across universities, they would say that having access to collections is their number one need. Technology is revolutionizing higher education, further exacerbating this need. The libraries are required to think about collection from a drastically different viewpoint.

In a networked world, local collections as ends in themselves make learning fragmentary and incomplete. Twenty-first-century collection management will therefore require increased collaboration within and among institutions, as well as a shift from thinking of collections as *products* to understanding collections as *components* of the academy's knowledge resources. A multi-institutional approach is the only one that now makes sense. (Association of Research Libraries, 2012)

For users, technology has brought down access barriers in an unprecedented manner. It also brought forth "one of the paradoxes of the digital age", as Hammond (2009) put it:

In a hybrid culture of print and digital resources, the amount of information available online is serving to lead more researchers to libraries and archives abroad and therefore increases their need for improved physical access to these collections. In addition, the expectations that academic library users have for online access are paradoxically increasing their need for physical access to information networks when they are abroad for study and research.

Clearly, students and faculty are more globally connected. Their learning, teaching and research are more globally

dependent, and their whereabouts more mobile. An international, multi-institutional approach makes sense.

It is true that the Internet and digital technology have practically eliminated the barriers for sharing large bodies of content across the continents. For East Asian libraries, the fact that something is digitally transmittable does not necessarily mean it is shareable. Political, economic, institutional, and cultural constraints continue to exist. Because of these, a library may not be willing or feel comfortable to share their digital assets despite the fact that the content has no transmission or copyright issues. A library may have no interest in sharing if sharing does not add any “credit” to its achievement list based on which it will be appraised. A library may be willing to share but may not put sharing high on its priority list. At Cornell, we have encountered various situations: some libraries were willing to share. Others, even some perceived leaders in digitization, were not willing to share. Some started with quid pro quo in the first conversation. Also a few were passionate about sharing but had very little means to make it happen.

We have established several different levels of sharing arrangements to the extent that copyright and license agreements allow. The highest level is a reciprocal one. Our partner libraries and we agree to make our collection available to each other's faculty and students. Some of the collections are closed for unaffiliated users due to local decisions. In such a case, they are only available for on-campus access. We also work together to make our digitized content more accessible. Some of these were buried, others were not available before. Additionally, our reciprocal agreement includes providing reference and research support to each other's users when our local subject librarians determine that additional, in-country expertise can extend the service we provide for our local users. We have designated contacts for the latter; we put instructions

in our respective staff intranets. For examples of pulling digital content together, please see the portals we jointly built with the Tsinghua University Library in China (<http://ctdl.lib.tsinghua.edu.cn/frontpage/index.html>) and with the National Taiwan University Library (<http://www.lib.ntu.edu.tw/cu-ntu/index.html>). They are works in-progress and will be reviewed and updated periodically.



**Figure 1. Cornell-Tsinghua Joint Digital Resources portal.**  
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In discussions about sharing digital content, we have lobbied for not limiting the access to Cornell's IP range but opening it up freely to the world. We succeeded in some cases but not in others.

The next level is a "share what you can" approach. We agree to allow access to certain collections on a case-by-case basis. We agree to help each other's faculty and students locate certain resources where in-country knowledge is especially advantageous. We do not provide access to closed collections

to each other online or onsite. This agreement is predicated upon available staff resource on either side.

The third level is a “one-off sharing” approach. We agree to help each other on one-time requests. For instance, we have asked a partner library to evaluate our Chinese journal collection in a particular subject domain and recommend to us titles to which Cornell must subscribe. In turn, we are training two staff members of this library in a preservation program at Cornell. This type of collaboration is infrequent yet no less valuable, because it helps us to do things we otherwise would not be able to do. It is also different from a courtesy relationship because we explicitly expressed that we would like to build trust and assess each other’s capabilities for possible, substantial collaboration in the future.

#### Lessons Learned:

- Partnership rests on trust. Understanding and accepting partner’s needs, culture and readiness to engage without judgment is crucial.
- The needs on both sides may not be in the same area. Therefore, forcing reciprocal arrangements could hurt rather than help the partnership.
- Successful partnership is always a win-win arrangement, but the win does not have to be always equal, nor at the same time.

## **Case #2: Partnership on Processing**

Cornell has been heavily relying on approval plan purchasing method for books published in Western European languages. Yet, we still buy Chinese-language books in a traditional way. The impetus to look for a different approach in 2010 was twofold: The budget cuts the library experienced required us to look for efficiencies and savings in all segments of library’s

operations. Even without the budgetary pressure, looking for ways to increase the order fulfillment rate and to shorten the time between ordering of a title to making it circulation-ready has always been our goal. Cornell decided to look for a service that has both the approval-plan and shelf-ready processing components. In China, providing approval-plan-like service to domestic libraries is nothing new, but few vendors have U.S. library customers. Due to the way publication export and import industry is regulated, only a handful of companies are authorized to provide the service. We selected three providers to investigate. They were all reputable companies with hardworking staff. Nevertheless, we were still concerned about cataloging.

It is no small feat for Chinese service providers to catalog Chinese-language materials in USMARC, because most of the Chinese research libraries use CNMARC and the Chinese Library Classification System. Cornell needs quality cataloging in USMARC that is provided with consistency.

After we voiced our concern, one of our book vendors approached Hong Kong University Library, inquiring about its interest in providing fee-based, full cataloging service for Cornell. Hong Kong University Library responded positively. This was a surprise development but a better solution than other alternatives we had at the time. Hong Kong University Library is a leading research library in East Asia. It has rich collection and capable staff. Most important of all, it catalogs its own books in USMARC routinely and is, in fact, the leading contributor of bibliographic records to the OCLC WorldCat among East Asian libraries. We were thrilled to collaborate with the library.

After a series of discussions, we launched a three-party collaboration pilot in 2010. The three parties are: Cornell, Hong Kong University Library, and a Chinese book vendor in

Beijing. The division of labor and a simplified illustration of workflow are as follows:

- Cornell developed a purchasing profile, a set of cataloging requirements and a set of processing specifications for Hong Kong University Library and the book vendor. The three parties jointly developed a workflow. We will be putting our specifications online very soon.
- Hong Kong University Library selects monographs published in China that fit Cornell's purchasing profile. It sends title information to the vendor in Beijing.
- The vendor searches the selected titles in Cornell's online catalog, eliminating those that Cornell already has. It orders the remaining books on Cornell's behalf and informs Hong Kong University Library of the final titles that are being purchased.
- Because Hong Kong University Library itself purchases the majority of the Chinese books Cornell buys, it is able to catalog our books "with book-in-hand", although Cornell's books never travel physically to Hong Kong during the process.
- Hong Kong sends full-cataloging records to Cornell on a monthly basis. It also sends call numbers to the vendor. The vendor gives the books shelf-ready treatment and ships them to Cornell.
- Cornell staff utilizes locally developed programming scripts to link the books received from China with the cataloging records from Hong Kong.

**2. Security Strips:**

- a. Security strips should be placed into every item.
- b. First, remove the shorter, darker green tab to expose the adhesive. (Fig. 2.1)
- c. Insert the exposed adhesive side between 2 pages of the book, as close to the spine as possible, and preferably near the back. Allow the adhesive to stick to the page, but make sure that no printed information is covered. (Fig. 2.2)
- d. After inserting the strip, remove the remaining green strip to expose the other adhesive side (Fig. 2.3), and the 2 pages will stick together over the strip (Fig. 2.4). Make sure that the strip is inserted far enough toward the spine, so that all printing is still visible.



Fig. 2.1



Fig. 2.2

**Figure 2. Processing specifications. ©2012, Cornell University Library. Used with permission.**

We are in the second year of the pilot. The subjects covered are economics, fine arts, law, and we just added philosophy this year. All three parties learned lessons through the process of working together. There were and still are issues we need to resolve, but overall, the experience has been positive. Therefore, we are continuing this project.

**Lessons Learned:**

- Some best solutions are unforeseen. In-country knowledge of the partners could create such solutions for U.S. libraries. Earnest discussion can open doors.
- Partnerships with a library differ from that with a for-profit service provider. Sensitivity and constraints are different. Recognition of the differences and open communication about them ensures a safe collaborative environment.
- Business has to make money in order to survive. Libraries can help for-profit partners create a business model that benefits both the libraries and the provider.

## Case #3: Staff Exchange

Cornell has been working with several premier research libraries in China. We have an especially close relationship with Tsinghua University Library. Over a decade, several library directors on both sides have cultivated and advanced this relationship. In 2009, we signed an official memorandum of understanding and became sister libraries.

Each year, we exchange one or two library staff. The exchange visit lasts between one to two months. Typically, the sending library initiates an exchange inquiry. The hosting library surveys its units and lodging options for the visitors, and both sides agree on a final visiting time frame. During the planning stage, the hosting library requests three things from the visiting staff: a) a resume, b) a list of visiting interests, and c) the title of a presentation the person will give during the visit. It is time worth spent to clarify the visiting interests thoroughly beforehand. It is also important to schedule the visits at the hosting unit's convenience. In today's environment, most libraries have more work to do than their staffing allows. This sensitivity to one's own local needs ensures staff acceptance and support of the partnership.

It is worth noting that despite pre-trip communication, the hosting library may still find itself in a situation when the visiting staff had something entirely different in mind. This is because we may use the same terminologies to describe the interests, but the definitions of the terms could vary considerably between U.S. and Chinese libraries. We have learned, for example, that the term, "technical services", meant very different things in our partner library.

We ask all the exchange staff to give a public presentation during their stay. These presentations are open to all interested staff. Depending on the topic, we may also promote it to

appropriate departments on campus. Tsinghua often promotes the presentations to other research libraries in Beijing. We obtain the presenter's permission and share his or her PowerPoint on our staff intranets.



**Figure 3. Tsinghua exchange librarian presenting at Cornell University Library. ©2011, Cornell University Library. Used with permission.**

Additionally, in all of our visiting agendas, whether at Cornell or at Tsinghua, we include cultural activities such as outings, shopping or dinner at a staff's home. These are often one of the most memorable activities, our exchange staff tell us, because they help put how we work in a "how we live", cultural context. But these activities are not easy to do, because they often take place after work. We have been lucky to have generous staff members who volunteer their time. Please see Appendix I for an edited version of a week-agenda for two exchange librarians who visited Cornell in 2012.

Staff exchange is an excellent approach to bring fresh ideas into the partnering libraries. One big challenge is the language barrier. This problem is more serious for Cornell exchange staff going to China. We have observed that more and more Tsinghua librarians have adequate English proficiency and can communicate with Cornell library staff reasonably freely. In contrast, Cornell staff's communication in Tsinghua is dependent on the conversation partner's English proficiency level. This undoubtedly limits the exchange experience. Another challenge is how to spread the exchange opportunity across different job levels in the library.

#### Lessons Learned:

- It is essential to make expectations clear and early, both to the visiting staff and the hosting units.
- Most of the library staff will not have the opportunity to travel overseas to the partner libraries. Building components into the visiting agenda to increase interaction (e.g. seating the visiting staff in units instead of in a stand-alone office) and information sharing (e.g. presentation) will increase the benefit of the exchange.
- The home library's workload of exchange staff does not go away during the exchange period. The exchange staff often needs to "work two jobs". Libraries need to provide adequate office accommodations to ease this situation.

## Case #4: Information Exchange

Two years ago, Cornell and Tsinghua University Libraries decided to start sending each other a newsletter semi-annually. The objectives were a) to keep each other more informed of developments at our respective libraries and b) to spot collaborative opportunities early. An Associate University Librarian at Tsinghua and I are designated contacts for all

matters of collaboration between our two libraries. Naturally, we assumed the role of coordinating and producing the newsletters. We limited the newsletters to no more than two pages as a way to be selective content-wise and to appeal to staff.

After having produced three issues over a year and a half, we realized that the construct of the newsletter did not allow in-depth description of any project and initiative. Only a few staff members read the newsletters. No collaboration was directly resulted from information made available through the newsletter. We have terminated the newsletter exchange. We still believe information sharing is important, because both libraries are doing a lot of innovative work in common interest areas. Currently, we are considering a theme-based approach, i.e., selecting one topic and sharing information in more depth. We hope this approach would address some of the weaknesses of the newsletter. But without experimenting with it, we do not really know how well it will go. If it turned out to be less useful than intended, we would discontinue it as well.

#### Lessons Learned:

- Not all good ideas bring real value. Candid re-evaluation signals a serious commitment to substantive partnership. It helps strengthen the tie between the partners.
- Although libraries around the world share common challenges, ways to address them differ drastically. Some ideas, although innovative, only work in their local environment.
- Partnership is a continuous improvement process. Terminating an unsuccessful activity is as equally valuable as continuing a successful one.

A global librarian, in essence, is a good ambassador and partner. A good ambassador bridges both sides with effective

communication. A good partner creates trust and incentives that make both parties want to work together for a common goal.



**Figure 4. Eating together is a must for relationship building.**  
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The ultimate challenge for all these partnership cases is how to keep them alive and meaningful, how to advance them to respond to changing needs, how to make sure incentives are mutually understood and supported, how contributions are fairly distributed, and how to lead them through leadership and staff turnovers as well as political and economic changes.

## Urgencies We Face

When an institution makes internationalization a strategy, it is in for a long haul of learning, adapting, internalizing and applying the learning towards more effective relationship

building and opportunity creation. The nature of international partnership is always iterative, the process susceptible to the environmental changes, and outcomes vulnerable.

Internally, we need to know how to stay in synch with our own universities. This is not a simple task especially in a decentralized institution. When one is in the field in East Asia, it is at times an overwhelming and exuberant feeling when faced with many seemingly promising opportunities and genuinely enthusiastic colleagues. How do we assess which partnership has a better probability to succeed? At Cornell, we do not have an established, systematic way to do this assessment before, but fortunately, one of our library's 2012 priorities was to seek partnerships to develop projects/programs that strengthen Cornell's research environment and enhance opportunities for researchers nationally and globally. In response, I worked with a team to develop two tools that will help us assess potential and existing partnerships in order to maintain quality initiatives. These tools are under review and we plan to make them available openly when they are final. Before the tools were developed, I use a simple checklist to force myself to exercise disciplined decision-making. These are common-sense questions but I find the process of going through them especially helpful when partners put money on the table.

- What does the partnership bring to my library?
- Why this partner?
- Why now?
- For this partnership to be successful, what assumptions must be true? How do I know?
- How much resources would this partnership cost?
- Can it last?

Numerous additional questions will sprout from them. Our institutional needs will drive how we dig deeper.

Creating and maintaining international partnership is an expensive business. It is no less laborious than establishing a service point in a foreign land where the library has little control. In addition to time and money, its success depends heavily on several essential skills that librarians need to have to start and sustain a partnership. They include assessment skills, cultural knowledge and skills to communicate and integrate with international partners in thought and practice. Most of these skills are typically missing from our competency list. Addressing this situation remains a big challenge for us at Cornell. I offer some thoughts about possible approaches in the Conclusion section with the hope that collectively, the libraries could find a solution. But one thing is clear, we cannot assume that native speakers can naturally take on the global librarians' role, nor should we so assume, because non-native speakers can be very successful if given adequate training and opportunities to practice. In the U.S, the ethnic diversity among the library staff and the users is both a blessing and a curse. Our daily exposure to diverse cultures heightens our awareness but also hinders us from realizing how much in-depth knowledge we lack, especially when it comes to partnering with those whose language and culture are so different from our own, such as libraries in East Asian.

No matter how accurate our assessment of an opportunity is, we may fail if we lack the ability to grasp cultural differences, because culture is the soil in which the opportunity grows or dies.

"You cannot —ever— get the sensation of an odor without actually smelling it. There are probably several experiences that can be truly felt only directly, never vicariously—and certainly one of these is the phenomenon known as *culture shock*. It is a sensation experienced by almost everyone who is exposed to a way of life basically different from his own. It can be

described, analyzed, and explained. But unless one experiences it directly, he does not know it; he only knows *about* it." (Stueart, 2007)

An excellent comparison of the work culture in China, Taiwan, and the U.S. was done by Alon (2003, Chapter 11) who studied the work goals (sometimes referred as "work values") of business students. He asked the research subjects to rank the importance of different factors, using numbers one to twenty:

The Mainland Chinese ranked "Using my abilities" as the most important goal, followed by "Earnings," "A feeling of personal worth," "A sense of achievement," and "Relationships with coworkers." For the Taiwan Chinese respondents, "A sense of achievement" was the most important, followed by "Relationships with coworkers," "Earnings," "Interesting work," and "Job security." The American participants rated "A feeling of personal worth" as the most valued work goal, followed by "Job security," "Opportunity for promotion," "Time for family life," and "Interesting work." The item "Relationships with coworkers," one of the five most important work goals for both Chinese groups, was ranked twelfth by the Americans. As a contrast, "Time for family life" is ranked number four by American participants but they are among the least important factors for Taiwan and Mainland Chinese participants, number fifteen and nineteen respectively.

These cultural differences translate into incentives, behaviors and decisions that determine the success or failure of a relationship. The international partnerships libraries form are our hands-on opportunities to move beyond "knowing about them" to "know them", so that we can effectively work with them.

## Conclusion

Looking forward, research libraries face an exciting era in which we can assume an important role in our parent institutions' global endeavor. Our own colleges and departments could alienate us if we do not take action now. When we develop our programs and services, the question for us to ask is no longer "why partner?" but "why not partner internationally?"

Individual libraries will continue to choose different forms of international partnerships that are best fit for our institutional needs. But are our needs so different that we have to address them in solo? Can we or should we individually build talent pools and competencies for international engagement? Can we or should we consider consortial approaches for international partnerships? How do we take advantage of expertise on our own campuses for training and skills building? Most importantly, we need to ask ourselves whether research libraries have made international partnership a priority. If we have, we will need to seriously and quickly invest in systematic training, building and sharing best practices and transferrable partnership models, and aggressively promote the value and skills we bring to the university's international table. Without these actions, the relevance of the libraries will be further eroded in a digitally and internationally connected academy.

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# **Appendix I**

## **Agenda**

**August 27-August 31, 2012**

**For the Deputy Director of the Cataloguing Department  
and the Systems Librarian, Tsinghua University Library**

### **Monday, August 27**

1:00-2:30 pm Tour of Library Annex

3:00-4:00 pm RDA, Metadata, Digital Collections

### **Tuesday, August 28**

9:00-10:00 am Information Technology and Digital  
Scholarship & Preservation Services

2:00-4:00 pm Processing of Chinese Materials

### **Wednesday, August 29**

10:00-11:00 am Meet the Director of Preservation

1:00-2:00 pm Meet the Director of Scholarly Communication  
Services

2:00-3:00 pm Overview of Research Data Management  
Services

## **Thursday, August 30**

10:00-11:00 am E-Resource Services

2:00-3:00 pm Acquisitions Trends & Services

## **Friday, August 31**

9:30-10:30 am Tour of Olin & Uris Libraries

11:00 am-noon Special Collections Cataloging

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Created by Edward Weissman, Assistant to the University Librarian,  
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# **A GLOBAL BOOK EXCHANGE: CREATING PARTNERSHIPS ACROSS THE SEA**

**JULIE WANG AND BERN MULLIGAN,  
BINGHAMTON UNIVERSITY LIBRARIES**

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## ABSTRACT

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This article traces the development of the pilot book exchange project between Binghamton University Libraries and Beijing Normal University Library from its inception in 2008 to its completion in 2011. This includes a description of the initial and subsequent trips that were made to China by Julie Wang, Asian and Asian American Studies Librarian, and John M. Meador, Jr., Dean of Libraries. It also chronicles some of the “behind-the-scenes” work that went on at both sites that made the project successful. Finally, it describes some of the possibilities for collaboration with other Chinese libraries that have arisen as a result of these trips.

**Keywords:** international book exchange, international partnerships between libraries, collaboration between US and Chinese libraries, book exchange procedures, book shipments to China, university library, academic library, international collaboration, case study, gift books

# A “GLOBAL” BOOK EXCHANGE: CREATING PARTNERSHIPS ACROSS THE SEA

## Introduction

Like most academic libraries, Binghamton University Libraries have received many book donations throughout the years from faculty, staff, students, and community members. Books that are donated to the Libraries can bring value in several ways: as direct additions to our collections, as cash from the proceeds of both traditional and online book sales, and as exchanges for other books from other libraries. It is this last way that has taken a decidedly “global” turn in recent years.

Until recently, Binghamton University Libraries’ collections in vernacular Chinese, Japanese, and Korean (CJK) materials were limited in number and scope. In 2002, the Libraries had less than 500 CJK volumes total. However, in February of that year, the University received a \$1.75 million grant from the Freeman Foundation. One of the initiatives established by the grant was to begin building the CJK collections through new acquisitions and the hiring of a CJK cataloger/bibliographer. By 2008, there were over 20,000 volumes available, which helped support the change in status of Asian and Asian American Studies from a program to a department that year.

As the grant expenditure ended in 2008, however, the Libraries faced a dilemma: there were no dedicated funds to support the continued growth of the CJK collections even though there was growing demand for these materials. To address this situation, the Libraries needed to look for alternative strategies for collection development. One strategy was to explore the possibility of exchanging books with international partner libraries.

## Establishing a Partnership

After the normalization of Sino-US relations in the late 1970s, book exchanges between U.S. and Chinese libraries resumed in an attempt to fill in the “knowledge gap” between East and West. Examples include “Window to China,” a Chinese government program that distributes books from China to libraries overseas, and Bridge to Asia, a non-profit organization based in the U.S. that collects duplicate material from libraries or individuals to ship to China. But these programs were unilateral in nature, involving one-way distribution. There are also academic journal exchange programs between institutions, but the quantity of exchanged titles is limited by their publication cycle. Among existing programs, one seldom found well-established partnerships that collaborate on book exchanges based on mutual interests and on a relatively large scale.

So the timing was right in Summer 2008 when Julie Wang, the new Asian and Asian American Studies Librarian, was selected to join the North American Chinese Studies Librarian Delegation and visit China that October. In addition to her agenda as a delegate, she thought this would be a good opportunity to connect with a prospective Chinese library and work on a possible book exchange program to obtain more vernacular Chinese material. She suggested this to the Dean of Libraries, John M. Meador, Jr., who agreed to co-sponsor her trip.

During the October trip, she met with representatives from three different libraries. After returning and discussing the matter with Dean Meador and Edward Shephard, Director of Collection Development and Management, it was decided that Binghamton University Libraries would begin a pilot book exchange with Beijing Normal University Library (BNU).

Beijing Normal University Library is one of the largest and most comprehensive research libraries in China, with holdings of over 4 million volumes and over 250 online electronic databases. It is noted for its prestigious collections in education and the humanities.<sup>1</sup> And much like us, it had a lot of duplicate material, only in Chinese. It was under restrictions for purchasing foreign material and needed an alternative strategy for its acquisition. So it was the perfect complement to us, which laid the cornerstone for our collaboration.



**Figure 1. Beijing Normal University, October 2008**

After all the details had been worked out, a formal memorandum of understanding was signed by Dean Meador and Dr. Songbo Liu, Director of Beijing Normal University Library, in March 2009. Both parties agreed to exchange 1,000 titles in the pilot phase of the project. That month we sent the first “pick list” of potential titles in English or other European languages selected from gift books not chosen to be included in our collection to BNU Library. The following month, we received a pick list of potential titles in Chinese. The book exchange had begun.

## Book Exchange: Pilot Phase

From the very beginning, this book exchange was different from other exchange programs. Instead of simply giving away unwanted duplicate material, we agreed to offer each other pick lists. The pick lists would not only match the other's collection focus but also enable each partner to choose what they wanted. The only cost would be shipping the chosen books to the other party.

The first step was to set up teams at both locations. At Binghamton University Libraries, the team consisted of the project coordinator (Julie Wang), the gifts coordinator (Nancy Abashian), the CJK bibliographic assistant (I-Fang Wu), the subject librarians, and several student workers. At Beijing Normal University Library, the team consisted of the project coordinator (Deputy Director Qiong Wang), the Head of Collection Development (Haiyan Wu), the subject librarians, and staff members in acquisitions and cataloging. No new staff members were hired for the project at either site, as current staff accommodated the additional work.



**Figure 2. Deputy Director Qiong Wang and Asian and Asian American Studies Librarian Julie Wang at Beijing Normal University Library, October 2008**

The second step was to set up profiles. In order to prepare the pick lists and better understand each other's collection needs, specific selection criteria were exchanged first. A detailed exclusion list was also created. For example, our Libraries did not want any textbooks but BNU Library, as China's leading teacher training center, did.

Step three involved creating an efficient workflow process involving two-way traffic. At BU Libraries, "outflow" would begin with inputting book information into the Libraries' gift database by students. Afterwards, all gift books would be put on shelves for review by our subject librarians. Books not chosen to be included in our collections would become available for the exchange with BNU Library. Using their selection criteria, a pick list would be generated and sent to them by our project coordinator. After we received their selections, students would pull the appropriate items and pack them for shipment to China. "Inflow" would begin when we received a pick list from BNU Library. Appropriate titles would be selected by the Asian and Asian American Studies Librarian. The titles would be checked for duplication by students. The final selection list would be sent back to BNU Library. After we received the books, the CJK bibliographic assistant would process them. During the cataloging process, a special note, "International Book Exchange Program. Received from Beijing Normal University Library, the People's Republic of China, (year)." would be added into the 599 (local note) field of each bibliographic record. (BNU Library would add a similar note in their bibliographic records for books received from us.)

As mentioned above, our only cost (aside from the indirect cost of staff time) was that of shipping the chosen books to China. Determining a cost-efficient way to do this turned out to be the most difficult aspect of the entire project.

There are two main strategies for shipping books to China. One is to ship them collectively. An example is the “Books for China Project,”<sup>ii</sup> a non-profit organization founded by John T. Ma in 2005, which collects private book donations in the U.S. in several coastal cities. All donations are stored in designated warehouses until there are enough books to fill a large container. Once the container is filled, it is shipped via boat to Qingdao, a coastal city in China. The second strategy is to ship them individually. Kara Phillips, Collection Development Librarian/Associate Director at Seattle University’s Law Library, described how she shipped 300 law books to Jiaotong University, Shanghai as a one-time shipment via private cargo in an article entitled “Shanghai Express: Donating and Shipping Law Books Overseas” (2007).<sup>iii</sup>

We initially thought shipment via boat would be cheaper than via airmail. However, as we looked into this further, we discovered that all shipments via boat are done port-to-port. In our case, this would include an additional cost of shipping the books overland to a port city like New York. It might also involve a storage fee. And on the other end, BNU Library would have to pay to have the books shipped overland from a port city as well.

Since we knew we wouldn’t be shipping 1,000 titles all at once, we decided to look into the cost of airmail. Our gift coordinator made calls and received quotes from different carriers. Compared with port-to-port sea shipment, shipment via airmail is quicker, safer, and more convenient. Although it costs a little more, it would save staff time and avoid many hassles for both parties. And it is traceable, something that could be very important. The first shipment, 437 titles/445 volumes from the first two pick lists, left BU Libraries on July 31, 2009 via UPS Air Delivery.

When we received our first shipment from Beijing without any problems, we were excited and optimistic that the same would happen with our shipment to China. However, this turned out not to be the case. China has restrictions on importing foreign print materials. The customs office in Beijing held the shipment five months before releasing it. It was relatively large, since it combined books from two pick lists on one pallet, which might have raised suspicions. There were also questions as to why the packing list didn't show the cost of the books, even though it stated very clearly that they were gift books. And it turned out (we were not aware of this) that BNU Library was closed during this time. When the customs office contacted them with questions about the shipment, there was no one there to respond immediately. The situation was resolved, but it involved a lot of extra paperwork and an extra storage fee.

We were quite relieved when we heard that they had finally received the books. We were even more pleased to learn that they were very happy with them. As Qiong Wang put it, they had high academic value and were very good quality.

Here are a few of the “shipping to China” lessons we learned from this experience:

1. Our partner needs to make arrangements with the government prior to receiving our shipment.
2. When preparing a pick list, avoid politically sensitive titles, e.g., books on Tibetan or Taiwanese independence.
3. If a shipment includes several boxes, put a mailing label on each box; mark all boxes in sequential order (1/8, 2/8, etc.); insert a separate packing list in each box. That way, if a box goes missing along the way, it will still be traceable.
4. In addition to information such as author, title, and publisher include a column for estimated value on the packing lists. State very clearly that they are gift books.

5. Send an email alert to our partner with the packing lists before the carrier picks up the shipment to make sure staff will be there to receive it. Give them plenty of lead time and documentation to prepare for any unexpected investigation from the customs office.

## **The Binghamton University Trip to China, Spring 2010**

In August 2009, Binghamton University Libraries received \$2,500 from the Lois B. DeFleur International Innovation Fund (a campus program) for a proposal entitled “Strengthening BU Libraries’ Partnership with Beijing Normal University Library.” This grant provided support for a trip to visit BNU Library to discuss the existing book exchange and generate discussion on additional collaborations in library technology, collection planning, and materials processing. The trip was a joint effort between the Libraries and the Department of Theatre, which had its own long-standing partnership with The National Academy of Chinese Theater Art. The delegation was made up of faculty and students from the Department of Theatre and included Dean Meador and Julie Wang, whose itinerary also included discussions with administrators at several different libraries about the possibility of establishing partnerships.

Between May 26 and June 3, 2010, Dean Meador and Julie Wang visited five libraries: Peking University Library, Tsinghua University Library, The National Library of China, The National Academy of Chinese Theatre Arts, and Beijing Normal University Library.

Peking University and Tsinghua University are the two most prestigious universities in China. Peking University Library’s large-scale digitization projects and Tsinghua University

Library's newly constructed Humanities and Social Science Library were quite impressive.

The National Library of China is the nation's largest library. Its speedy adoption of new technology and its leadership role among Chinese libraries make it a showcase for the modern library within China.

At The National Academy of Chinese Theater Art, Dean Meador gave a lecture entitled "The Current Challenges of American Academic Libraries." Then the dean and Julie met with the Deputy Secretary, Mr. Shiying Li, and the Library Director, Dr. Zhen Hai. An agreement was reached to explore a book exchange between the two parties focusing on theater and performing arts. After, they attended a reception hosted by the academy's president, Mr. Du. They also attended the opening night production of Arthur Miller's play *All My Sons* as performed by Binghamton University faculty and students.



**Figure 3. Dr. Zhen Hai and Dean John M. Meador, Jr. at The National Academy of Chinese Theater Art, June 2010**

The highlight of the trip was the visit to Beijing Normal University Library. The dean and Julie observed the book cataloging process for exchange titles and were able to inspect books designated for future shipment to BU Libraries. As part of the visit, the dean gave a lecture entitled “The Evolution of American University Libraries over the past Thirty Years, Their Current Challenges, and Predictions of Their Future” for the campus and local library staff.



**Figure 4. Julie Wang, Dean Meador, and Haiyan Wu inspect the cataloging records for the book exchange titles at BNU Library, May 2010.**

The dean and Julie met with Dr. Liu and the four deputy directors and had formal discussions on a variety of topics. Both parties agreed to continue the book exchange project with some modifications to workflow and procedures. Additional discussions involved exchanging librarians between BNU and BU, collaborating on library research projects, and co-hosting an international workshop or conference.



**Figure 5. Meeting at BNU Library, May 2010**

## **More Partnerships on the Horizon**

Having learned about the “Window to China” program during the trip, Julie looked into enrolling BU Libraries in it once she returned. She contacted Jie Wu, coordinator of the program at the Peking University Library Gift Office. With Ms. Wu’s assistance, we began receiving books from this program in 2011. But as a byproduct of this contact, we established a book exchange project with Peking University Library as well following the procedures already in place from our pilot project with BNU Library, only on a much smaller scale. To date, we have received three pick lists from them and chosen 55 titles/66 volumes and sent two pick lists to them and shipped 112 titles/113 volumes.

On October 10, 2012, Dr. Zhen Hai, Library Director at The National Academy of Chinese Theater Art and scholar of Chinese Musicology, whom the dean and Julie had met on

their 2010 trip, travelled to Binghamton University to give a lecture entitled “Chinese Theatrical Music and Dramatic Genres” at the Confucius Institute of Chinese Opera. The dean hosted a luncheon reception for Dr. Hai in Bartle Library. During the tour of the library, Dr. Hai was pleased to see that the book he had given to the dean in 2010 is now part of our Libraries’ Special Collections. As mentioned above, a book exchange between the two libraries focusing on theater and performing arts is being explored.

## Conclusion

During pilot projects like this, unanticipated issues often occur. Even though they may initially seem difficult, by working through them, they can actually improve the process. Such was the case with our first shipment to China. After all the irregularities were worked out (including changing our carrier from UPS to FedEx) the second and third shipments, sent out on July 19, 2010, and May 6, 2011, respectively, arrived in China “without a hitch.”

The pilot book exchange between the Binghamton University Libraries and Beijing Normal University Library was completed in summer 2011. All told, we sent eight pick lists to BNU Library containing 2,378 titles and they sent eight pick lists to us containing 5,469 titles. Eventually we received and cataloged 1,083 titles; they received and cataloged 1,057 titles.

Afterwards, both parties seemed eager to continue the collaboration. In October 2011, while Julie was in China to attend a conference in Xiamen, she paid a visit to BNU Library. She met with Dr. Liu, Qing Wang, and the other three deputy directors and they discussed renewing our partnership. An agreement was reached to exchange another 1,000 titles. In addition to this title-by-title exchange, Julie suggested that if

both parties receive large donations that are subject-specific and of high research value, it would be very labor efficient to ship the entire donation as a whole instead of adding the individual titles to pick lists, pending partner approval. The possibilities for joint research opportunities and a librarian exchange were also discussed. In November 2012, a second memorandum of understanding was signed between the libraries, incorporating these new features.

To say that the inaugural book exchange program between Binghamton University Libraries and Beijing Normal University Library was a success would be an understatement. Not only did it build the collections of the partner libraries in areas where they were in most need, but it also built up good will between the parties that will last beyond the duration of any one project. We have established not only a partnership but also a friendship that will provide the basis for much future collaboration.

Four factors contributed greatly to this success and its potential for sustainability. The first is the sheer number of book donations that our Libraries receive each year, which made it possible even to consider an exchange with another library. Eventually, this model may change as more and more books are published online, but for the short term, the books continue to flow in. The second was the creation of an inventory management system for donated books in January 2009, from which lists are produced for librarians according to their subject areas, vastly improving the decision process for adding items to our established collections and also allowing Julie to “piggyback” on this process to identify items for the exchange. The third is the vision and support of our dean, who recognized the exchange as the initial step in establishing a lasting relationship with a foreign partner library. The fourth and perhaps most important is having someone like Julie on staff who could travel to China and use her personal

connection with her alma mater to lay the groundwork for the project. Although other possibilities exist (e.g., a teaching faculty member from China could serve in this role), having the same person handle the negotiations and manage the project is truly ideal.

The trips made by Julie Wang and Dean Meador, particularly the 2010 trip, provided an opportunity for Binghamton University Libraries first to create and then strengthen an international partnership with Beijing Normal University Library while establishing connections with four other key Chinese libraries. They both addressed a need of our Libraries (a strategy for increasing the Chinese collections) and enhanced our global reputation. The reciprocal visit from Dr. Hai this past October reinforces the notion that raising one's profile by international exchanges leads to better understanding between globally distant parties. With the success of the Chinese exchanges, plans are in the works to explore partnering with Korean and Japanese libraries in the future.

## Footnotes

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# **IMPLEMENTING THE LEARNING COMMONS IN A MIDDLE EASTERN UNIVERSITY LIBRARY: THE CASE OF ZAYED UNIVERSITY**

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## ABSTRACT

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Librarians pursuing global stage opportunities find themselves facing challenges and situations that may not exist in their own home countries. As more young people are being given the opportunity to pursue higher education in the United Arab Emirates, librarians find themselves stepping back and rethinking their traditional approaches to information literacy, library services and hours of operation to meet needs of their patrons in the host country. Recently, more Middle Eastern Institutions of higher education have become interested in the Learning Commons (LC) Model that has been popular in North America, Europe and Australia. The collaborative culture of the people in the Middle East makes it interesting to see how the implementation of LC evolves. The United Arab Emirates has invited many expatriates who include librarians to boost personnel requirements in many sectors, including the academic. The result is a group of professional librarians from various cultures and backgrounds serving an almost completely homogenous group of patrons. They therefore have to learn and adapt to a new environment. This chapter explores the introduction of the learning commons model and its impact on the library's importance to student success at the collegiate level.

**Keywords:** Learning Commons, Middle East, United Arab Emirates, Zayed University, information literacy, university library, academic library

# **IMPLEMENTING THE LEARNING COMMONS IN A MIDDLE EASTERN UNIVERSITY LIBRARY: THE CASE OF ZAYED UNIVERSITY**

## **1. Introduction**

### **a). Background: Libraries and Higher Education in the Middle East**

Academic libraries in United Arab Emirates (UAE) universities, like in most parts of the world, are generally reflective of the courses and programs taught at their respective institutions. While public libraries are the main source of knowledge and information in the UAE, school libraries vary in depth and comprehensiveness. According to Macpherson, Kachelhoffer and El Nemr (2007, p. 4, quoting the *Al-Ittihad Daily* of 19 November 2005), one of the problems encountered in the UAE school system is of “Poor libraries and learning support. Libraries are poorly stocked, textbooks are rigid and unrelated to learning processes, and laboratories are badly maintained”. As a result, students who enroll into university come with a wide variety of experiences using library services and resources. With this background, librarians prepare themselves to bridge any shortcomings that may jeopardize student library experiences at university. Students at Zayed University (ZU) use English as a second language for instruction. However, there are differences in English language aptitude between students coming from attending private versus those from public schools in the UAE. ZU therefore uses an Academic Bridge Program (ABP) to make the transition more manageable for all students. According to the

ZU website ([http://www.zu.ac.ae/main/en/colleges/colleges\\_abp/index.aspx](http://www.zu.ac.ae/main/en/colleges/colleges_abp/index.aspx)):

The ABP is an English as a foreign language program which prepares students for admission to the university degree programs. The main aim of the Academic Bridge Program is to bring students English language skills to a high level so that they can be successful when they enter University College (*one of ZU discipline colleges*) and the baccalaureate program.

All students in the ABP program also get support in the Learning Enhancement Center of the Library & Learning Commons (L&LC) through resources available such as graded readers, reading comprehension exercises, grammar and testing resources to enhance their language skills. They also get such services as tutoring, and centers for developing their writing and math skills.

## **b). Demographics: ZU Students**

There are more female than male students at ZU. Several explanations clarify this phenomenon, for example at ZU female students have been present from the inception while male students joined 4 years ago. However, as explained by Ridge (2009) the dropout rate, repetition rate, and lower achievement rate is higher for boys than for girls from UAE high schools. This is only partially reflected in University enrolment as demonstrated at ZU in the 2012 Self-Study draft document (p.85) that shows, for example, that out of a total of 2491 students placed from Fall 2009 to 2012, 2090 are female and 401 male. This is one of the incentives for faculty to work towards retention of these students if the Emiratization program is to make progress.

## **2. Emiratization**

The Emiratization agenda of the UAE government encourages and enables the employment of more UAE nationals in a meaningful and efficient way. It is a Federal Authority for Government Human Resources (2010) policy which is partly expressed in manpower development and education. That results in a push within the University not only to hire more Emirati nationals, but to enhance programs that support effective education and learning as well as student retention. This is expressed in the library by a move towards the L&LC model that supports the focus on abiding with the national culture but moving forward with the world.

## **3. Zayed University Library**

ZU Libraries were established in 1999, a year after the university was opened. The collection was mostly selected by faculty in order to fill the shelves and meet their immediate needs. With time however, selection development policies were developed and professional librarians were hired. Currently there are 35 employees in the library including six in the Technical Services, and the remaining equally divided in public services at the two campuses. With the growth of the university it is believed that there is a need to establish an archive in order to preserve the organization's history. In 2010, an archivist was hired and has begun building the archive collection at the Dubai campus library.

The collection currently includes almost 200,000 print titles on both campuses, over 250,000 titles in electronic format, 77 databases and a few hundred media resources. Both campus libraries have library classrooms equipped with computers for information literacy instruction. Library faculty work closely

with discipline faculty in the colloquy program and in major disciplines to teach information literacy.

## **4. How the Library Fits into the University Structure**

Librarians at ZU have faculty status and do undergo the same rigorous appraisal system as the rest of university faculty before promotion to any upper level. Librarians are required to teach Information Literacy to students at all levels of education to ensure that they graduate with good Information Literacy skills. Librarians thus partner with faculty from Advising and teach in Colloquy 120 (a first year, first semester course), and Colloquy 240 (an English Composition class taught in semester two) where students are required to write an essay of about 3,000 words.

Librarians also have liaison responsibilities and work closely with faculty in collection building and information literacy instruction in the majors where students work on their final research or graduating projects. Librarians are therefore invited to graduate programs orientation sessions and are allocated 90 minutes to two hours to familiarize graduate students with library resources to support their studies and research. Although the sessions in graduate studies are by invitation, the library works closely with the Graduate Office to ensure that time is allocated for library instruction.

The library is the center of the academic life of the university. As such, before any new program of studies is approved by the Provost Council, approval by the library director is required to ensure that the library has sufficient resources to support the course. This is an indication of the value of the library to the ZU academic community. In addition, Information Literacy is one of the Zayed University Learning Outcomes (ZULO).

Directly involving librarians is the third ZULO - the university realizes that in the current world, Information Literacy skills are key to academic progress and life skills. In addition, the Library Director is a member of all high administration councils as the voice of the library.

## **5. Expatriate Librarians and Faculty**

In many cases, librarians at ZU are experiencing a process of learning and adapting. They have to step back and rethink their traditional approaches to information literacy. The traditional approach to information literacy has been project-based with the intention to teach students to find information but not necessarily understand its relevance. Now there is a shift towards an inquiry-based approach embedded in the curriculum – especially bearing in mind that students often do not utilize the librarian for help or may not necessarily attend library orientation and instruction sessions. Using the inquiry-based approach relies on encouraging students to seek the truth as opposed to them giving answers that they think the instructor expects. The main reason is that in today's reality, memorizing is not necessarily the most efficient way of learning. Information is readily available, and facts change, therefore it is more important to make sense of the exponentially growing amount of information so as to generate useful and applicable knowledge. Appropriate resolutions to questions and issues work better than rigid solutions. However, the study by Levy and Petrilus (2012, p. 98) suggests that it is important to explore "students' experiences and understandings of inquiry and research at different levels of study within different disciplines".

It is important to take cognizance of the social nature of the library users in enhancing literacy instruction and computer training in the L&LC. It is notable that the iPad is regarded by

many as a fashionable accessory, unlike the bulky laptop. The iPad has been introduced to all new Academic Bridge Program (ABP) students at ZU in the Fall of 2012 (in addition to all current students already using laptops). Thus, there is a shift towards the application of technology to enhanced learning. As such, the university is trying to take advantage of its functionality to make learning fascinating to students, and in the process make learning reflect their interests and goals. This is all a part of attempting to take into account "students' prior experience of inquiry and research in educational contexts, and their beliefs about knowledge and learning" (Levy and Petrilus, 2012, p. 99). This is the context in which the L&LC operates.

At ZU, librarians originate from various cultures and backgrounds. Their previous experiences therefore have to be complementary towards effective teams. This is in the context of serving an almost completely homogenous group of patrons. The importance of local culture can therefore not be ignored. Oberembt (1998, p. 125) suggests that national culture refers to the way that a "like-acculturated group of people think about and do things". It includes all behavior that is learned through social interaction with others, such as the use of language, rituals, social organization, traditions, beliefs and technology. Of importance in this study is the finding made by Markus and Kitayama (1991, p.224) that:

many Asian cultures have distinct conceptions of individuality that insist on the fundamental relatedness of individuals to each other. The emphasis is on attending to others, fitting in, and harmonious interdependence with them.

This perspective is confirmed by Simadi and Kamali (2004) in their United Arab Emirates University (UAEU) study of the value system of university students. The significance of this for ZU librarians is the importance of understanding the Emirati

value system so as to be able to interact with the library user community in a way that makes sense in their culture. A discussion on culture inevitably refers to values. These are an “individual’s mental judgment about things, people, and social events” Simadi and Kamali (2004, p.19). The UAEU study also revealed that religious values are the main source of judgment among students. These values even impact the decision to have hours of operation that meet needs of patrons in the UAE – e.g. at ZU it also has to do with logistics of using the shared library space where males and females use L&LC facilities at allocated times. From the experience of working in Egypt, Oberembt (1998, p. 121) pointed out that:

libraries, whatever their broad similarities of mission and of operation, are embedded in different cultures, and those cultures infiltrate into every aspect of library business, affecting everything from the perception of what constitutes proper services to the preference for certain styles of management (and leadership) over others as offering the best means of meeting service goals.

This is confirmed by Wand (2011) in a paper discussing library constituents in developing a U.S.-accredited university in the Middle East, reflecting on their contributions to a successful library program. These findings further highlight the need to be aware of the national culture of the host country so as to provide effective library service within its confines. In fact, in their UAEU student value structure study, Simadi and Kamali (2004, p.19) found that “religious and cognitive values came first in the structure, while social and economic values came in last”, and use of the library is relevant to the latter.

Another point to bear in mind is that about the UAE schooling system that has implications on library service in that library skills training and information literacy classes have to be

introduced to students immediately at the point of beginning their university studies. This kind of support is essential especially when, as indicated already, ZU students use English as a second language with reading, writing and speaking proficiency levels varying widely. An InfOasis tutorial was created by ZU librarians in 2006 and 2007 to try and meet these requirements but its use has been viewed as lower than anticipated (Martin, Birks and Hunt, 2010).

According to the findings of a study by Wheeler and Anderson (2010), students do not appear to do work outside of class, and they are more comfortable with group work than with individual work. This creates an opportunity for the L&LC to work with the work groups on questions such as academic integrity and cheating to suit local culture and practices. These may be defined and understood differently from the way they are understood in the West, therefore have curriculum implications in which the library plays a support role. Kamhieh, *et.al* (2011) also report from their research findings that reading for pleasure is not necessarily common but can be enhanced by parents and teachers, and peers. But then quite often the student is the first generation to go to University level, creating academic reinforcement challenges on them, implying that the L&LC is one of the university places to reinforce the needed support.

## **6. Building a Learning Commons Around Student Needs**

The concept of a Learning Commons (LC) is relatively new in the UAE and one that has captured the attention of librarians and administrators wanting to encourage students to develop their information literacy skills as well as enhance their learning and academic performance. The concept of the LC was first introduced to the ZU community in a document called

**The Great University for the Great City of Abu Dhabi.** ([http://www.zu.ac.ae/main/files/contents/homepage/Convocation%202010/HE\\_Sheikh\\_Nayahan\\_bin\\_Mabarak\\_Al\\_Nahayan\\_President.pdf](http://www.zu.ac.ae/main/files/contents/homepage/Convocation%202010/HE_Sheikh_Nayahan_bin_Mabarak_Al_Nahayan_President.pdf)). The purpose of this document is to demonstrate how ZU supports Abu Dhabi's vision of being a "...an economically diversified, socially integrated and sustainable knowledge hub where Arabia and the world come together for innovation and enterprise." This is based on the *Destined To Lead* document by Sheikh Nahayan Al Mabarak Al Nahayan (2009).

ZU identifies the Learning Commons as an essential element to help our students reach their academic potential by becoming the "...intellectual hub of the campus.". ZU, by embracing the concept of the LC is working towards creating an integrated service model that brings together tutoring, writing, math, advising and technology support alongside traditional library research services, and in the process avoiding any possible duplication of effort. This model is similar to other Learning or Information Commons found in Universities such as: Loyola University Chicago, University of Georgia (Athens, US), or Victoria University (Melbourne, AU).

While not a radical approach in many western universities, it does present a specific set of challenges that are unique to the culture of a traditional Middle Eastern University. There is currently no available model in the UAE to follow as an example of the LC model in academic libraries, but the results of a study by Chu, Tse and Chow (2011) confirm the relevance of this approach by indicating that the collaboration of librarians with instructors in inquiry-based learning enhances students' information literacy skills and overall learning. The aim is to put more emphasis on student-centered activities throughout the entire university for purposes of enabling lifelong learning that is intended to develop or nurture critical thinking capabilities of students. This is also suggested by

research done by Hwang, *et. al* (2011, p.14) who conclude that the students in their study “showed greater interest and enjoyment in using PDAs to learn”. Library services are therefore face to face, web based, and service is offered at point of need.

The LC is a collaborative service that is managed by a partnership of faculty and staff from the University’s academic support services and the Library. The head of the LC reports to the Director of the Library and Learning Commons and is responsible for overseeing the daily operation of the facility. Areas of responsibility have been defined and the representatives from the various support groups meet both formally and informally to identify new programs and services, and discuss issues as they arise. This is where the University ZULO that emphasizes inquiry-based learning as a skill that qualifying students from ZU need to adopt is highlighted. That is a direct remedy to perceptions expressed in several research papers by Gardner, (1995), Hokal and Shaw (1999), Martin, Birks and Hunt (2010), Rugh (2002), and Shaw, *et. al*, (1995) about the UAE schooling system that mention the over-reliance on rote-memorization, didactic teaching methods, outmoded curriculum and ill-prepared graduates.

Key to the success of the LC was identifying partners who buy into the vision of the Learning Commons and are committed to collaborating to ensure student success. Under the guidance of the Chief Academic Officer, a Student Success Working Group was created to oversee the initiative for “an Integrated Student Success Plan”. The team included the Associate Dean of the University College, the Director of the Academic Bridge Program, the Director and Assistant Provost of University Enrollment Services, the Director of University Assessment, the Director of Student Life and the Campus Librarian. With high level department leaders on board, buy-in was smooth. The LC model takes this relationship one step further,

formalizing relationships, identifying these service providers as partners in the LC with a voice in future plans for the space and the types of services that will be available to our students. In the first phase of the Learning Commons the following departments have been identified as partners: The Writing and Math Centers, Peer Assisted Leadership Support (PALS) Tutoring Program, Advising, Accessibilities, IELTS and Academic Bridge Tutoring Support.

The Writing and Math Centers have long been located in the Library on both campuses (Abu Dhabi and Dubai) with services available to both the male and female students. Because of the nature of the relationship between the Library and these two centers, this has been the easiest transition in terms of the Learning Commons model. The major challenge facing both areas is the increasing reliance on iPads and how that will impact the delivery of support services. With the opening of the Learning Commons, both centers are exploring how to use online modules to allow students to do more on their own, but still giving them the human assistance as needed.

Another challenge facing both centers is staffing. Currently faculty work in both centers as part of their regular teaching load, but this is under discussion in the departments and at times it can be a challenge to work around class schedules and at the same time ensure that faculty are available when students are free to seek them out. In the future it is hoped to have a full-time coordinator assigned to oversee the operations and work closely with the Learning Commons Supervisor to plan additional services in support of student success.

PALS (Peer Assisted Leader Support) is newly relocated in the Learning Commons and will be responsible for all the tutoring that occurs in the LC. In the past, PALS has focused on providing their services to students in the colloquy program,

but with its move to the LC they will expand their services to students enrolled in the ABP. This service was previously managed by the Learning Enhancement Center of the Library. PALS as a tutoring service has grown in popularity over the past few years, and the major concern is making sure there are enough advisors to meet the growing demand.

Other partners include Advisors (known as Student Success Officers), Office of Accessibilities and ABP Faculty Tutors. Over the next year, the services provided will continue to evolve. Each group has been provided space in the LC and all parties will work together to monitor the use of the spaces allocated.

Locating these groups near one another to provide centralized support, is phase one in the development of the LC. Over the next year, we will be hiring a Learning Commons Supervisor to oversee the daily operation of the program, work with existing partners to identify programs and workshops that can be offered under the LC umbrella. Assessment also plays a key role in the growth of the LC as it will help in determining how the LC needs to evolve to stay relevant and progressively valuable to student success.

While all these groups will be located in the LC, they will continue to report to their own department as identified in the University's organizational chart. The implication of a "One University—Two Campus" reality also makes it essential to use a variety of online tools to record and communicate student use of the services. Accommodating this cross-organizational collaboration requires the commitment of all parties and to find ways to work together effectively without impacting the services being provided to the students. One administrative tool that is being used to facilitate this complex working relationship is a memorandum of understanding (MOU). The MOU identifies the responsibilities of each party involved in

the LC; it puts in writing what the relationship is between the different groups involved and who is responsible for the different aspects of service being offered in the LC.

Logistical considerations also include the need to duplicate services so as to provide equitable services to both genders in their separate LC spaces. There sometimes tends to be a perception of inequality of services available to the males on campus, since the latter are a smaller group. In Abu Dhabi, the males have access to the LC during the hours that the Library is open, however in Dubai access is limited to late afternoons and evenings. The decision was made to leave PALS, the Writing and Math Center in their current location because of their location in the Male wing of the library. The Library recently opened an office in that wing and will provide research assistance to the males in the afternoon prior to the start of their classes. By moving library support into this area, the LC model has been duplicated on a smaller scale to ensure that males have access to the same services as the females in main LC on the Dubai campus. (Note: The Library does stay open late and has librarians available in the evening when the males are on campus). The long term goal is to design a LC that will accommodate both males and females in the same space or in proximity depending on campus plans.

In Abu Dhabi, use of the Library space has had to be re-done for the convenience of faculty and administrative offices. In that regard, office space was allocated to make it easier for faculty to meet with students individually or in small groups. Another challenge was in finding a way of making it easier for faculty to move back and forth between the male and female side of the campus. Construction is currently underway to build doors that staff can use to move between the two spaces. In the computer labs, small offices were added with doors to each side of the building. Each door will have a programmed swipe card that will recognize faculty and staff, but not allow

students to unlock the doors. Security is also located nearby to ensure that only faculty and staff use the doors.

Neither library was designed to accommodate an LC on the scale that is being considered. Each campus is facing its own unique space issues that require innovative solutions to ensure that the design reflects the LC's commitment to providing services in an efficient and centralized manner. For example, in Dubai, the main challenge is in the size of the space and its "temporary nature". The long term plan is to design a new LC as part of a Library expansion, but in the meantime the LC is temporarily assigned space near where students gather. While the location promotes the LC and its services, it is in very congested quarters and efforts are always made to work together to schedule the spaces so that each service provider has access to spaces for both individual and group appointments.

A common element in most LCs is the visible presence of technology support. At this time, IT is not a visible presence in that it lacks a help desk or support center in the LC. The current IT Help Desk is located in the Computing Sciences Department and students are directed there if they have questions regarding their iPads or laptops. Technology is a work in progress and currently present in only a few of the labs and public services areas, Wi-Fi is incrementally becoming enhanced, and the availability of networked desk-tops for student use will be possible soon. In the initial roll-out of services in the LC, the decision was to focus on services that promote student success. While IT support is definitely important, the focus was on assessing the needs of the students and develop an IT presence that is in line with LC agenda. The University has made a commitment to using iPads throughout the curriculum and an assessment on how this will impact the services that need to be offered in the LC to support student growth in this area is in progress.

Finally, a minor challenge that has been faced is in translating the phrase “Learning Commons” into Arabic. At ZU many of the signs and publications are in both English and Arabic. All documents must be translated into Arabic before they are considered official. Because there is no direct equivalent to the term Learning Commons in Arabic, we had to find a translator who has an understanding of academic libraries who could then come up with a translation that works in the Arabic language.

## 7. Conclusion

When librarians are working in an environment that is different from what they are accustomed to, they have to step back and rethink their traditional approaches to information literacy, library services and hours of operation to meet needs of their patrons in the host country. Coming from various cultures and backgrounds serving an almost completely homogenous group of ZU patrons, united by the institutional goals and culture, they work better by adapting and learning their new environment. This is demonstrated in this chapter by highlighting that they are constantly re-focusing and re-tooling to match changing information needs and realities to suit an unpredictably changing information and technology framework. This is because of its nature of bringing together services that support students as groups as well as individuals in their learning, writing, research, enhancing their mathematical capabilities and use of technology. The introduction of a LC model has been popular in North America, Europe and Australia, and given the collaborative culture of the people in the Middle East, it will be interesting to see how its implementation at ZU evolves.

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# **TRANSCENDING ETHNIC, RACIAL AND POLITICAL CONFLICT TO ACHIEVE UNDERSTANDING BETWEEN THE GREEK AND TURKISH CYPRIOT LIBRARY COMMUNITIES**

**CONSTANTIA CONSTANTINOU**

**SUNY DISTINGUISHED LIBRARIAN;  
CIES FULBRIGHT SCHOLAR**

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## ABSTRACT

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“Transcending Ethnic, Racial and Political Conflict to Achieve Understanding between the Greek and Turkish Cypriot Library Communities” describes the work of a Fulbright Scholar in the field of library science in Cyprus. Working with the Greek Cypriot and the Turkish Cypriot library communities, Ms. Constantinou developed bi-communal programs for the Cypriot library communities to explore areas of mutual benefit, collaboration, and understanding. To achieve this, Ms. Constantinou conducted public lectures, held conversations and organized training sessions for librarians. She worked towards facilitating the conversations between the University of Cyprus and the OCLC Network that enabled Cyprus to become a member of the OCLC global bibliographic network. In addition, she promoted the principles of the Cyprus Library National Consortium and worked closely with the United States Department of State, to enable two Cypriot librarians from the Turkish and Greek Cypriot university communities to travel to the United States in order to engage in further training and exposure to American library practices.

**Keywords:** Conflict resolution; ethnic, racial, cultural and political diversity; international library collaborations; Cypriot library communities; the Cyprus Conflict; Council of International Exchange of Scholars; Fulbright Scholars; Global librarianship; OCLC

# **TRANSCENDING ETHNIC, RACIAL AND POLITICAL CONFLICT TO ACHIEVE UNDERSTANDING BETWEEN THE GREEK AND TURKISH CYPRIOT LIBRARY COMMUNITIES**

## **Introduction:**

Cultivating relationships and friendships among different ethnic, racial and politically diverse societies is a perpetual endeavor, especially when conflict has been rooted for centuries in peoples' mind and character. The essay "Transcending Ethnic, Racial and Political Conflict to Achieve Understanding between the Greek and Turkish Cypriot Library Communities" describes my work as a Fulbright Senior Specialist in 2005 and as Fulbright Scholar in 2011 in the country of Cyprus. The Fulbright Program is sponsored by the United States Department of State, Bureau of Educational and Cultural Affairs. Under a cooperative agreement with the Bureau, the Council for International Exchange of Scholars (CIES) assists in the administration of the Fulbright Scholar Program for faculty and professionals in 155 countries in every region of the world in a variety of disciplines.

## **Country Background:**

Cyprus is a country located in the Mediterranean Sea, east of Greece, south of Turkey, west of Syria and north of Egypt. Cyprus is the third largest island in the Mediterranean Sea and it is a member state of the European Union. Due to its strategic location, Cyprus has accumulated centuries of rich and ancient history that dates to the 10<sup>th</sup> millennium BC. Cyprus's position has made it an attractive target for military control as well as

for economic trade. The Mycenean Greeks, the Assyrians, the Egyptians, the Persians, the Ptolemaics, the Romans, the Byzantines, the French, the Venetians, the Ottomans and the British have all had interest in establishing control over the island. Finally, Cyprus gained independence from British rule in 1960.

Centuries of occupation brought cultural richness and diversity to the Island of Cyprus. However, this has also resulted in ethnic and religious conflict among the different Cypriot communities as well as the political disputes in the country's governing bodies. The Republic of Cyprus became an independent state from the British in 1960, and a month later, it became a member of the United Nations. The Constitution of the Republic of Cyprus, which came into effect on the day of independence, was intended to balance the interests of both the Greek Cypriot and Turkish Cypriot communities. Cyprus, Greece, Turkey, and the United Kingdom entered into a treaty to guarantee the basic provisions of the Cyprus Constitution and the territorial integrity of Cyprus [1].

Despite the treaty, the accumulated tension between the two Cypriot communities (Greek and Turkish) resulted in the outbreak of violence in 1963. United Nations Peacekeeping Forces were deployed to Cyprus in 1964 to prevent further fighting between the Greek Cypriot and Turkish Cypriot communities. In 1974, the conflict escalated to a war that divided Cyprus into two sections (North and South), keeping the Greek Cypriots and Turkish Cypriots separated to this day. The United Nations Council mandated the United Nations Peacekeeping Force to stay on the Island, try to maintain a ceasefire, and guard the buffer zone that divides the country to the present times (Figure 1).



**Figure 1. United Nations Peacekeeping Force in Cyprus (UNFICYP). M-113 APCs of the Canadian Contingent on patrol near Nicosia. 28 August 1974, Nicosia, Cyprus, Photo # 69123.**  
**Source: United Nations News & Media Photo (Image owner: United Nations), photo by Yutaka Nagata. [2]**

## **Cyprus 2005, Fulbright Senior Specialist:**

I arrived in Cyprus in December 2005, as a Fulbright Senior Specialist. My assignment entailed working with the librarians at the University of Cyprus in the southern Greek Cypriot sector. The objective of my assignment was to develop a Reference and User Services Department for the University's Libraries.

The University of Cyprus was established in 1989 and admitted its first students in 1992. It was founded in response to the growing intellectual needs of the Cypriot people, and is

well placed to fulfill the numerous aspirations of the country. Admission for the majority of undergraduate students is by entrance examinations organized by the Ministry of Education and Culture of the Republic of Cyprus. When the University of Cyprus first opened its doors to students, the incoming class consisted of 486 undergraduate students. During the academic year 2010-2011, 4,691 undergraduate students attended courses offered by the 21 departments with 1,549 postgraduate students [3].

The University of Cyprus Libraries, employed approximately fifty professionals, the collections are about 267.289 books, with an annual increase of approximately 12.000 new titles. Some of the important collections among the Library holdings include the Cyprus Studies Collection, Archaeological Collection and Turkish Studies Collection. The Library has a unique mission to serve the learning and information needs of the academic community (undergraduate and graduate students, academic staff, researchers and administrative staff), while maintaining within its scope the provision of information services to the broader scientific community of the entire country of Cyprus [4].

The library culture and practices in Cyprus, as well as in many European countries, are quite different from American librarianship. The concepts of “reference services”, “bibliographic instruction” and “information literacy” were not emphasized in academic librarianship. In addition, ideas that may be considered as the “teaching mission of a library” or “library instructional activities” in the United States were not familiar concepts on Cyprus. Cataloging, acquisition, information systems, and technical services were more emphasized through personnel allocation and strategic planning effort.

In order to create a reference unit at the University of Cyprus, I had to first work with the librarians and professional staff on evaluating the concepts and principles of Reference and User Services. For this purpose, I organized a series of lectures, seminars, and workshops for the Library's professional staff. These lectures and training workshops included topics on "Pedagogy of Reference Services and Research Techniques," "Marketing and Promoting Reference Services," "Information Literacy" and "Assessment of Reference Services". Most importantly, I worked closely with the librarians, the teaching faculty and the academic leadership of the Cyprus University to facilitate a curriculum design which incorporated the university libraries

resources. Since the concept of reference services presented the librarians with the new idea of librarians as information specialists, and in some cases subject specialists, I considered it of great importance to cultivate a climate that fostered and promoted information literacy among faculty, librarians, and students through meetings and discussions. Other projects included reviewing operational procedures, assisting with the Library's strategic planning, participating in discussions to evaluate and assess a new information library system, and facilitating discussions among the academic and research libraries in Cyprus for establishing the Cyprus Library Union Catalog. My work in 2005 set the foundations for forming strong professional associations, friendships and building trust that would allow me to return to Cyprus six years later to continue the work.

## **Cyprus 2011, Fulbright Scholar:**

In 2011, I returned to Cyprus as a Fulbright Scholar. As a Fulbright Scholar, the objectives of my assignment were much broader as it would have international implications: my work

with the academic library community at the University of Cyprus was about to reach a national and international scope. The Fulbright assignment entailed working with the two divided Cypriot communities. The Cypriot Turks and the Cypriot Greeks have been separated and isolated from each other since 1974. The United Nations (UN) Council Peacekeeping Force is stationed in Cyprus to maintain ceasefire, and to guard the buffer zone that keeps the two communities apart:

On 20 July 1974, Turkey using as a pretext the Coup of 15 July against the legal Government of the Republic of Cyprus, invaded the country, in violation of the UN Charter and fundamental principles of international law. The dire consequences of the invasion and subsequent military action by Turkey, are still felt today by the people of Cyprus. The military occupation, forcible division, violation of human rights, massive colonization, cultural destruction, property usurpation and ethnic segregation imposed since Turkey's military invasion remain the main characteristics of the status quo on the island. [5]

The two communities exist without any infrastructure that allows any communication between the two sides. There is no telephone system or a cell phone satellite reception, or postal services to enable any type of communication and interaction between the North part of Cyprus and the South. A person crossing the United Nations guarded boarders, which is only allowed for a maximum of 12-hour period, has no means of communicating with the other part of Cyprus. In most areas of the Turkish occupied Cyprus, (the North), time has stopped as of July 1974, when the invasion took place (Figures 2, 3)



**Figure 2. Areas in Cyprus UN-Controlled Buffer Zone Untouched Since 1974.** Since fighting erupted between Greek and Turkish Cypriots in 1974, the area dividing Greek Cyprus from its Turkish counterpart, abandoned and left virtually untouched by human activity, has fallen within a buffer zone controlled by the United Nations Peacekeeping Force in Cyprus (UNFICYP). 02 February 2010, Nicosia, Cyprus, Photo # 428513. Source: United Nations News & Media Photo (Image owner: United Nations). Photo by Eskinder Debebe. [6]



**Figure 3. Areas in Cyprus UN-Controlled Buffer Zone Untouched Since 1974.** Since fighting erupted between Greek and Turkish Cypriots in 1974, the area dividing Greek Cyprus from its Turkish counterpart, abandoned and left virtually untouched by human activity, has fallen within a buffer zone controlled by the United Nations Peacekeeping Force in Cyprus (UNFICYP). 2 February 2010, Nicosia, Cyprus, Photo # 428507.

Source: United Nations News & Media Photo (Image owner: United Nations), photo by Eskinder Debebe. [7]

## The Political Climate, Cyprus and Middle East:

When I arrived in Cyprus in January of 2011, reform and social revolution were taking place in the Middle East, starting with Libya, Egypt, Yemen, and Syria. During the “Arab Spring” the entire political climate of the Middle East was charged with demonstrations, violence in the streets, and attempts to overthrow governments.

Dr. Ismail Serageldin, director of the Bibliotheca Alexandrina (BA) in Egypt and chairman of the Executive Council of the World Digital Library (WDL), was invited to Cyprus on February 11, 2011 by the *Cyprus Institute*. I had corresponded with Dr. Serageldin, letting him know that I was looking forward to his lecture and meeting him in person. Unfortunately, his trip to Cyprus was canceled due to the events unfolding in Egypt [8]. By February 1, 2011 news reached Cyprus that looting was taking place in the Museum of Egyptian Antiquities in Cairo. Knowing that the Museum of Egyptian Antiquities is at a very close proximity with the Bibliotheca Alexandrina, I decided to send an email inquiring about the library:

— Original Message —

**Subject:** BA

**Date:** Wed, 02 Feb 2011 11:39:49 -0500

**From:** Constantia Constantinou

<constantia.constantinou@fulbrightmail.org>

**To:** ismail.serageldin@bibalex.org

*Dear Ismail,*

*I hope you are able to receive email messages. All eyes are turn to Egypt. We are all watching as the situation is changing by the hour. I am contacting you to ask if the BA remains safe and secure. The leadership of the library world in the USA is deeply concerned about the safety of Egypt's cultural heritage and its people. If there is anything we, your colleagues in the USA, can do to help and protect, please do not hesitate to let us know.*

*Respectfully,*

*Constantia Constantinou  
US Fulbright Scholar,*

*Library and Information Science  
Cyprus, 2011*

The next day, I received an email response from Mr. Mounir, Secretary of Dr. Ismail Serageldin:

*On 2/3/2011 7:06 AM, Hanan Mounir wrote:*

*This is just a brief message to let you know that the Library is safe. In case you had not seen it, below is a statement by Dr. Serageldin that has been posted on our website. It still represents the current situation, except that the President and the PM have made reasonable statements, but they have come late. Let's hope that it is the beginning of a resolution. In addition to the statement, we posted pictures and a video of the youth of Alexandria defending the Library against vandalism and looting [www.bibalex.org](http://www.bibalex.org). Please see it and please bring it to the attention of other people.*

*Here is the statement:*

*To our friends around the world:  
The Events in Egypt*

*The world has witnessed an unprecedented popular action in the streets of Egypt. Led by Egypt's youth, with their justified demands for more freedom, more democracy, lower prices for necessities and more employment opportunities. These youths demanded immediate and far-reaching changes. This was met by violent conflicts with the police, who were routed. The army was called in and was welcomed by the demonstrators, but initially their presence was more symbolic than active. Events deteriorated as lawless bands of thugs, and maybe agents provocateurs, appeared and looting began. The young people organized themselves into groups that directed traffic, protected neighborhoods and guarded public buildings of*

*value such as the Egyptian Museum and the Library of Alexandria. They are collaborating with the army. This makeshift arrangement is in place until full public order returns.*

*The library is safe thanks to Egypt's youth, whether they be the staff of the Library or the representatives of the demonstrators, who are joining us in guarding the building from potential vandals and looters. I am there daily within the bounds of the curfew hours. However, the Library will be closed to the public for the next few days until the curfew is lifted and events unfold towards an end to the lawlessness and a move towards the resolution of the political issues that triggered the demonstrations (Figure 4).*



**Figure 4. The Library of Alexandria during the protests protected by citizens against looting and possible damage.**  
**Photo by Shira S. [9]**

The Middle East region is one of the most troubled and restless places on our planet. Six months prior to my arrival in Cyprus, the *New York Times* published an article, “Letter from Cyprus in a Divided Land: Lessons in Living Together”, by Nick Thorpe (August 15, 2010). The reporter interviewed a group of 29 Jews, Muslims, Christians, and secularists from fifteen countries visiting Nicosia, Cyprus’ divided capital. Nick Thorpe asked Father Ngabirano, a Catholic priest from Uganda, what he would take home from his trip to Cyprus. The priest responded, “The challenge is to apply what I have learned here without being regarded as a traitor by my own community — or a spy by the other.”

The events in of the Arab Spring and the *New York Times* article brought a hard realization that “trust” was to become the most crucial and essential element of my work with the Greek and Turkish communities of Cyprus. My position is unique: although I am an American citizen, I am also a native of Cyprus being of Greek Cypriot descent. I had to be able to connect, earn the trust and work closely with the Turkish Cypriot community as well as with the Greek Cypriot community as a true friend to both communities. Navigating the political and human conflict that has been cultivated in this troubled region for centuries would be the most important and challenging aspect of my work.

## **The Fulbright Assignment:**

I started my work by establishing good relations with the Office of Public Affairs at the American Embassy in Nicosia. Through a series of meetings and consultation sessions, I was able to understand the different political dynamics that I was going to encounter in the two communities. Even as a Cypriot national, and being well informed in the cultural and political sensitivities of the two communities, my meetings at the

American Embassy of Nicosia proved to be invaluable for information sharing and reflection on daily events around the country. The Office of Public Affairs at the American Embassy introduced me to the local Fulbright Commission Officers in the Greek and Turkish Cypriot communities who became my liaisons to their respective university communities, as well as to the other library communities at large, such as the public libraries, the monastic and research libraries, medical and specialized libraries.

The scope of my proposed project was twofold: (1) work with the Greek Cypriot and Turkish Cypriot Universities in addressing their individual library challenges, and assist with their future plans and aspirations; and (2) promote understanding while honoring cultural, ethnic, and religious differences between the two ethnic communities (Turkish and Greek Cypriots).

As I began my project I realized that language is not only the means of communication, but is the means for deeper understanding of culture such as humor, songs and idioms. I speak Greek fluently, but I speak very little Turkish. I made it my goal to improve my language skills in Turkish so that I could reach out and relate to my colleagues from the Turkish Cypriot library community. Therefore, while I was in Cyprus, I was attending intensive evening classes in Turkish.

After successfully completing these tasks, I turned my efforts towards the next level of international collaboration by facilitating an agreement between OCLC's European network leadership team and Cyprus. The successful outcome of these negotiations enabled the largest university library in Cyprus to join the global bibliographic system and provide the basis for a robust national library system.

In order to navigate the political climate and overcome the human conflict that has been cultivated in this troubled region for centuries between the two Cypriot communities, it became imperative to find ways that promoted understanding between the Greek and Turkish Cypriot library communities while honoring their cultural, ethnic, and religious differences. The answer to this approach came in the nature of bi-communal programs. I returned to the Office of Public Affairs in Nicosia and I asked to develop bi-communal library programs for the Greek and Turkish Cypriot communities consisting of seminars, lectures, and conferences. Through the support of the United States State Department, I was able to invite and bring, Ms. Anne Richardson Kenney, Director of the Cornell University Library system to Cyprus to speak on the topic of library collaborations. Her lecture used the Cornell-Columbia “2CUL” model to demonstrate the type of collaborations that could be possible among different institutions.

Through a highly politically-ethnically sensitive process, political leaders, librarians, and educators from these two war-torn communities attended the one-day conference hosted at the Cyprus Fulbright Center, located in the neutral United Nations buffer zone. The conference afforded the opportunity to librarians and educators to meet each other for the first time, to recognize each other as “lesser-enemies”, to explore ideas of mutual benefit, trust, collaboration, and cultural understanding (Figures 5, 6, 7).



**Figure 5. Greek Cypriot and Turkish Cypriot librarians gathered at the Nicosia Fulbright Center for the Anne R. Kenney Lecture on collaboration among libraries, April 2010, photo by Constantia Constantinou.**



**Figure 6. Ms. Anne R. Kenney shaking hands with ex-minister of Education, Cyprus (Dr. Sofianos) and Executive Director of Cyprus Fulbright Commission, Mr. Daniel Chajitofi during a reception before the lecture, April 2010, photo by Constantia Constantinou.**



**Figure 7. Greek Cypriot Librarians hosted a luncheon for the Turkish Cypriot Librarians at the “Chateau Restaurant” in Nicosia, Capital of Cyprus at the United Nations Buffer Zone, April 2010, photo by Constantia Constantinou.**

The event was a success and as a result, I proceeded to collaborate with the United States State Department to write a grant sponsoring the visit of two Cypriot librarians (one Turkish, the other Greek) to the United States. This trip was to engage the librarians into further understanding of the diverse but highly collaborative practices of libraries among academic and research institutions. The librarians spent their time visiting and discussing library practices with American librarians at the State University System of New York (SUNY), Cornell University, and Columbia University in New York City.

Even with the success of all these activities, I was still trying to make a “real and lasting impression”, in the worlds of these two library communities that were destined to exist in separate worlds. *Trust* is never a given, *Trust* is earned and always put to the test, especially in societies and communities where religious, racial, political and ethnic conflict was cultivated for centuries.

## The Book:

In the last days of my assignment I was visiting one of the major Turkish Cypriot Libraries when the librarians took out a book from their special collections. It was at that moment when my two divided worlds of Greek and Turkish Cypriots have finally come together: The book was published in Istanbul in 1884 and written in the Greek alphabet. Since the Turkish librarians knew I could read Greek, they offered the book to me to help them understand the work's origins and content. According to the Greek handwritten inscription on the title page, the book belonged to a Greek woman who lived in Istanbul at the turn of the 20th century. However, the text when I read it made no sense to me.

I read it aloud to the Turkish librarians and their eyes lit up and with an expression of understanding. They began to discuss the book in Turkish and I was dumbfounded since I understood nothing of what the Greek text read. The Turkish Cypriot librarians understood my spoken words since the Greek text spelled out the phonetic pronunciation of Turkish words! This 1884 publication, phonetically pronouncing the Turkish text was printed with the Greek alphabet. Immediately, we all recognized the book as a rare type of printed work called *Karamanlidika*, the language of the Karamanlides, a language used by the Turkish-speaking Orthodox Christians of Cappadocia, a region of the troglodytic ecclesiastical and monastic communities of the Byzantine Empire (Figure 8).

At that moment, there was an incredible realization of how the lives of the Turks and the Greeks have been so intertwined, their fate inseparable, but their existence to remain divided throughout the centuries.

ΚΙΤΑΪΗ ΜΟΥΚΑΤΤΕΣ  
ΤΙΑΧΟΣ  
ΑΧΤΗ ΑΤΙΚ  
ΙΑΕ  
ΑΧΤΗ ΤΖΕΤΙΤ  
ΤΙΑΝΙ  
ΠΑΛΛΙΑ ΒΕ ΝΕΑ ΔΙΑΘΗΚΗ

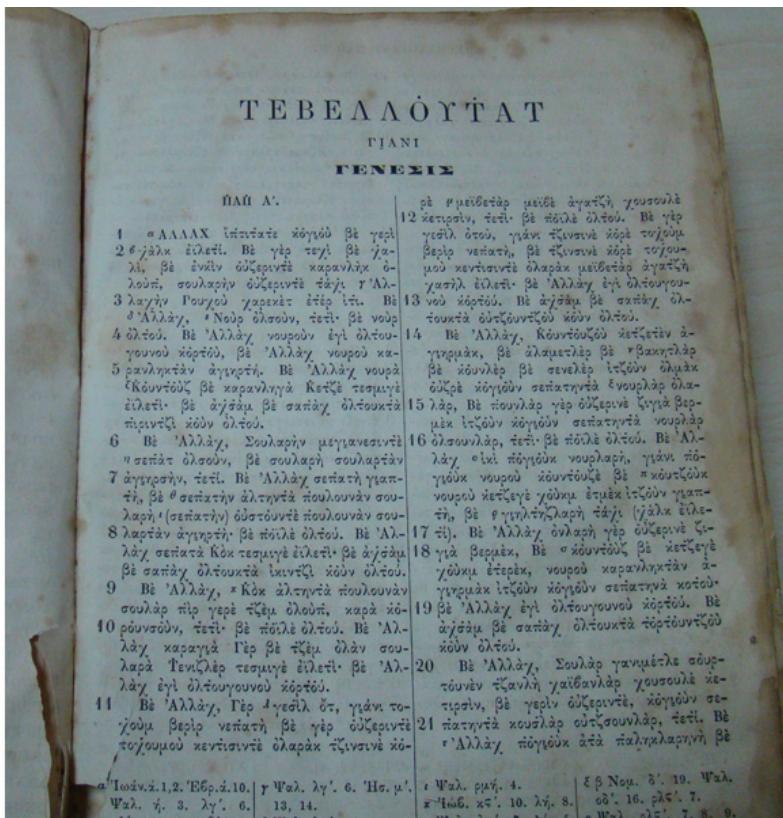
ΑΝ ΛΣΗΑ ΜΟΥΧΑΡΡΕΤ-ΗΟΥΔΟΥΤΟΙΟΥ ΗΡΑΝΙ ΒΕ ΤΙΟΥΝΑΙ  
ΑΙΣΑΝΑΛΑΡΗΝΤΑΝ ΤΕΡΤΖΟΥΜΕ ΟΑΟΥΝΟΥ

مأهول عمومي نظارات جليلة سان رخصة  
٤٦٩ : رجب ٩٩ ٧ ميلاد ٩٨ نومرو  
مسارق اسكندرية بول شركي طرفندن شوبه أولدرى

ΙΠΤΙΑΤΕΡΡΑ ΒΕ ΜΕΜΑΛΙΚΙ ΣΑΪΡΕΤΕ ΜΟΥΚΑΤΤΕΣ ΚΙΤΑΪΛΑΡΗ ΝΕΣΡΙ  
ΤΖΟΥΝ ΤΕΣΚΙΑ ΕΤΙΑΕΝ ΣΗΡΚΕΤΙΝ ΜΕΣΑΡΙΦΗΑΕ

ΙΣΤΑΝΙΟΛΤΑ  
Α. Χ. ΗΟΓΙΑΤΖΙΑΝ ΜΑΤΙΛΑΣΗΝΤΑ ΤΑΗ ΟΑΟΥΝΜΟΥΣ ΤΟΥΡ

1884



**Figure 8. Old and New Testament, Istanbul, 1884, photo by Constantia Constantinou, March 2010.**

## The Universal Message:

As my assignments were coming to completion and time was running out in Cyprus, I started spending more time travelling through the countryside, both to the Greek Cypriot as well as the Turkish Cypriot sections, in an attempt to gain a better understanding of the people through their daily lives.

One warm day, while travelling to a monastery, I passed through a small village. There, I came upon a sign planted in the middle of the main road. With Greek letters, the sign

spelled the words *Bibliothek* = *Demokratia* + *Kritike Skepsis*, (*Library* = *Democracy* + *Critical Thinking*). I drove back to the village and looked around to find the library, and perhaps the librarian who planted such a great sign in the middle of the road, but there wasn't any. I asked about the library but there was none to be found. This is a small village of a farming community of 300 souls, I was told. It has one grocery store, one school, three churches, but no library. Yet the sign in the middle of the road conveys an important message. A message that library scholars and academicians have tried to teach and lecture in the classrooms and in lecture halls, at conferences and seminars throughout their entire careers there was the message only to be discovered on a sign at the middle of road, in a small village where there is no library: *Library* = *Democracy* + *Critical Thinking!* (Figure 9.)



**Figure 9. Greek sign on the main road of a village reads: "Library = Democracy + Critical Thinking", Photo by Constantia Constantinou, April 2010**

## Conclusion:

History, especially in the Middle Eastern region, has repeatedly demonstrated that peace and coexistence are not inherent values. Trust, peace, friendship, and collaborations are not always achieved by treaties, governments or political figures. More often, peace and understanding and conflict resolution is achieved through the extraordinary efforts of common people like the teachers, educators and librarians I have come to know and respect through my work in Cyprus.

International library work requires specific and refined skills. As scholars of our discipline, mentors of practice, and advocates of freedom of expression, we work with our international partners to strive for common understanding. We honor diversity, and acknowledge and respect the political and cultural awareness that surrounds communities and countries. As guests in others' homes, libraries and countries, we open ourselves to learn from our hosts. In the process we discover that there are no universal solutions and there are no universal practices. Frequently we discover that solutions are imbedded in the roots of each community, each culture and in each ethnic identity. We do not inject ideas from our own preconceived methods and practices; instead we collaborate to discover solutions and ideas that derive from our host country and its people.

Senator J. William Fulbright, on the occasion of the thirtieth anniversary of the Fulbright Program, 1976 stated:

International educational exchange is the most significant current project designed to continue the process of humanizing mankind to the point, we would hope, that men can learn to live in peace—eventually even to cooperate in constructive activities rather than compete in a mindless contest of mutual destruction....We must try to expand the boundaries of human

wisdom, empathy and perception, and there is no way of doing that except through education. [10]

Despite the challenges of a small but troubled country like Cyprus, — a country that still remains divided since 1974 by borders, barbed wire, sandbags, political conflict and religious beliefs, — there is always the spirit of enlightenment that rises above our differences to reveal our humanity and to unite us in our common purpose.

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# WHEN GLOBAL BECOMES LOCAL: SERVING DIVERSE POPULATIONS

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## **ESCUCHA MI VOZ: ENGAGING LOCAL PEOPLE IN GLOBAL COMMUNITIES**

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WARREN BRANCH, DPL**

**EDMUND YE KIANG: SENIOR LIBRARIAN, ROSS-  
BARNUM BRANCH, DPL**

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## ABSTRACT

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For the Denver Public Library (DPL), recent increases in the local immigrant population have lead to a concerted effort to meet their needs through dedicated Learning and Language programs offered at six DPL branches. The programming developed and offered at DPL is based on an informal, practical and intergenerational approach that eschews linear classroom-style instruction. The signature program offered is *Plaza*, an idea based on a traditional plaza in which people of all ages and backgrounds can gather to exchange ideas, information and resources. Additional non-linear programming includes English Conversation Tables, artC and Visual Thinking Strategies, which encourage creativity and critical thinking while also providing participants with practical information they can use in their daily life. The concepts behind this approach are very adaptable and can be implemented in any library.

**Keywords:** Citizenship, Community Engagement, Denver, Colorado, Denver Public Library, Diversity, English as a Second Language, Family, Cohesion, Identity, Immigrants, Intergenerational Library Programming, Non-native English Speakers, Outreach, Visual Thinking Strategies

## ESCUCHA MI VOZ: ENGAGING LOCAL PEOPLE IN GLOBAL COMMUNITIES

*“Places like this inspire people, giving them the chance to go beyond their ideas. I think the library is a wonderful place where individuals can gather more resources and ideas to help them achieve their goals.”*

*—Vanessa, Plaza participant*

Few institutions serve a more diverse array of people than a public library, and in this sense, the library stands as a cultural microcosm of the world. This is particularly true in the Denver metropolitan area, which like many regions throughout the country is home to a growing population of new immigrants from a wide variety of backgrounds. In this increasingly diverse environment, finding ways to help connect these potential customers to the library and to their community has never been more important. At the Denver Public Library (DPL), we have met this challenge by introducing new styles of programming that optimize this diversity and enable our participants to have a voice in their community. We have experienced tremendous success by avoiding traditional classroom approaches to personal enrichment and instead focusing on informal, practical and intergenerational programs. Through on-going experimental efforts, we have seen our approach evolve into the current slate of Learning and Language (L&L) programs offered at six dedicated DPL branches. Finding success in this area is not an easy endeavor by any means, and it can often become a balancing act between commitment to programming and retaining a willingness to adapt and change. Nevertheless, we strongly believe the past and continued success we have found in our approach to

programming is one that can be replicated in other public library settings regardless of size, location or resources.

## Program Foundation

According to a Brookings Institute report on the U.S. Census Bureau's American Community Survey, the foreign-born population in the Denver metro area (Denver-Aurora-Broomfield, CO) increased by 80,858 (34.5%) between 2000 and 2010 (Wilson & Singer, 2011). This population primarily arrived from Mexico and Central America (65%), but also included immigrants from Asia (13% total with Vietnam the highest individual country at 4%), Europe (11%), Africa (4%), India (2%), South America (2%) and the Caribbean (2%) (Brookings Institute, 28-29). Because of this immigrant population increase, the need to serve these growing segments of the population has become a primary initiative for the Denver Public Library. Recognition of such demographic change is certainly not a new development for DPL; as far back as the early 1900s, the library was making efforts to serve a variety of immigrant populations. Evidence of this early awareness can be found in the establishment of several bilingual branch collections by 1913, which included a separate Swedish and Dutch collection at the Sarah Platt Decker Branch as well as a Yiddish and Hebrew collection in the Dickinson Branch (*City of Denver*, 1913). This tradition of welcoming and reaching out to newcomers continued into the twenty-first century, and eventually influenced the establishment of several pilot programs in 2004 that would grow into our current slate of Learning and Language programs.

The initial process originated in 2003, when DPL began a concerted effort to establish new, targeted services for the growing immigrant populations. At that time, the 2000 Census

data indicated the Hispanic population alone had grown 5.6%, the largest of any racial/ethnic group in the Denver metro area (Piton Foundation, 2). After conducting a thorough needs assessment along with a series of targeted focus groups, we began to develop a plan to reach these new immigrant populations. The next step was taken in fall 2004, as DPL fully embarked on a targeted services model. This process primarily identified specific branches throughout the city where an emphasis on developing services and programs for immigrants was needed most. Due to the significant increase in the Hispanic population during the previous decade, a pilot program was launched in predominantly Spanish speaking neighborhoods. This pilot provided us with an opportunity to experiment with a variety of services and programs. These targeted branches were then established as the Learning and Language cluster for DPL, with a shared objective of reaching new immigrants and non-English speakers. This pilot proved to be successful, and after various attempts to obtain funding, we were awarded a three-year grant from the Institute for Museum and Library Services (IMLS). This important award allowed our team of six branches to add resources and expand programming, an effort that would become known as *Tu Biblioteca Hoy /Your Library Today* (TBH).

TBH's initial objective was to serve Spanish speakers with few or no English skills. This was done by providing programs to learn English, receive GED support and develop specific life-skills and computer skills. It was during this initial grant-funded phase of TBH that an original and innovative program began to take shape. After some experimentation in the first years of the grant, a program called *Plaza* was piloted in 2009 during the final year of IMLS funding. Designed to be an intergenerational open-format program, the overall objective of Plaza is to help participants achieve personal goals by providing a wide array of resources, materials and individualized assistance in a comfortable and informal setting.

For example, a typical Plaza program might include children reading and working on crafts, adults practicing conversation skills in a second language, seniors learning to use the computer and job seekers working on resumes. Although IMLS funding soon ended, the Plaza was deemed a success due in large part to the staff's own efforts, as well as the clear potential for further development. For a period, funding was not available, but the programming was able to continue by focusing our energy on helping non-native English speakers find additional support to pursue activities of their choice.



**Picture 1: A Plaza assistant helps a participant with one-on-one attention as she works on a difficult homework assignment.**

Despite a period without external funding, this dedication paid off, and in 2011 we received a new grant through the Denver Foundation. At this point, our programming initiative became known as *Mi Biblioteca, Mi Futuro* (MBMF), and a full-time dedicated programming coordinator was hired to oversee the

further development of the existing programs. This addition proved to be a wise investment, as he infused the existing programs with creativity and brought in new collaborators to engage participants by using art and critical thinking. This in turn allowed the programming staff as a whole to better focus on new strategies that maximize our current resources to ensure sustainability. While details of this programming will be provided later in the chapter, it is first important to understand our general strategy in attracting participants.

## **Drawing Participants**

*“From the many years of implementing our programs and looking back from how they have evolved for our customers, it is fascinating to recognize that the success can be attributed to numerous staff dedicated to the achievements of another person.”*

*—Lisa Murillo, L&L Branch Manager*

To attract diverse populations, such as non-native English speakers, immigrants and their families, we have implemented a strategy of traditional and non-traditional forms of outreach. Such traditional methods include direct promotional efforts through flyer distribution and presentations conducted by library staff to community organizations and local businesses. Ongoing in-person visits also allow staff to collect feedback about programs and help us better understand the needs of different communities throughout the Denver metro area. In this way, the outreach efforts have ensured the programs are responsive, rather than prescriptive, to a community’s needs. By initiating conversations with not just program participants but also local businesses and independent professionals, the library is better able to monitor the pulse of the local community in terms of identifying trends, interests and needs.

for future programming. This direct outreach approach has opened up contact with local businesses through cross-collaborative efforts that have enabled new partnerships and helped increase our presence within our targeted communities.

While traditional outreach activities are certainly important, libraries in general are uniquely positioned to welcome all members of the community and expose them to additional programs, resources and services offered. Within our Learning and Language team, we have developed a term to refer to this concept known as “in-reach”, in which library customers are made aware of additional services and programs within the library and their own community. One might consider this approach a more positive and nonprofit-motivated form of upselling. An essential aspect of this approach requires that all staff members possess a thorough understanding of our programs and services in order to convey them to customers, which is made possible by training procedures that involve all staff members at every level. Before a new program idea is implemented, the cluster manager, program coordinator and senior librarians first discuss all possible changes. When a decision is made to change or add a program, a training schedule is formulated and circulated to the cluster’s Library Program Associates (LPA) who directly oversee the programs at each branch location. Once trained, they are then tasked with returning to their respective branch and sharing the new training information with the other branch staff. We supply each service desk with informational materials, and consistently update staff on new and noteworthy events taking place via email, branch staff meetings and organized cluster-wide events. Keeping everyone in the loop is a critical element. Our Learning and Language cluster has proven to be a very effective team, with all staff throughout the branches working together closely to ensure the success of the programs in all locations. Everyone is encouraged to engage with customers and refer them to the programs when appropriate, be it at the

desk, in the library stacks or in general day-to-day interactions. Furthermore, open communication between staff, community members and customers is essential given the fact that many of our new participants visit our branches largely because they learned about a particular service or program from a trusted source, be it a family member, neighbor or even their child's school. A strategy such as this not only helps us attract new participants, but also provides the staff an opportunity to connect with our customers and build trust between the library and the community.

## Approach To Plaza

*"Places like libraries give you great information, which can help your future. So, the community gives you resources like knowledge and experience, and both of those are important."*

*—Jaidee, Plaza participant*



**Picture 2: Plaza in action! Multimodal approaches are exemplified in this picture where multiple activities are occurring in one room.**

When we first developed our new programming approach, the name Plaza was chosen to evoke a sense of community and

collaboration. Many towns and cities in Latin America are built around a plaza that serves as a free, open place where people of all ages and backgrounds meet and spend time together, sharing conversation and other resources. Likewise, the Plaza programs provide a vibrant, rich environment for self-discovery. People come to Plaza with their own goals, and the library strives to connect them with resources and provide a sense of belonging through the support they find in their neighborhood library. While there is no fixed agenda here, some common needs are apparent. As a result, services have been built around needs that include job searching, studying for the GED and other tests, language learning, family literacy, health, homework and citizenship. The Plaza website brings together an array of both free and subscription online resources on these topics, and staff members are prepared to offer one-on-one assistance. Of course, Plaza participants also have access to DPL's full print and media collection. In this way, Plaza acts as a secondary reference service within the library for program participants by providing an additional avenue of access to library resources. The participants enter a space where information and resources are readily available, along with catered assistance and plenty of time. The participant may be there to address a specific goal, but along the way, he or she will also gain self-sufficiency, confidence and a sense of accomplishment. Much of this approach goes back to our goal of giving our participants the means to make their voice heard within the community. Despite different backgrounds, through the Plaza our participants are able to develop a sense of shared experience and purpose they can then use to further their goals within the community.



**Picture 3: Plaza programs see a diverse assortment of participants from a variety of age groups, ethnicities, and race all working alongside each other in small group sessions.**

From the very beginning, our programming objective was to avoid a strict linear classroom approach in which an instructor directly provides specific information to students by following an established curriculum. Therefore, in order to cater to a nonlinear approach, we created the Plaza programs to be as open and flexible as possible. This programming generally takes place in the evenings, when most participants are free from work. They are also offered on different days and in different branches throughout the city. Intergenerational participation is a key aspect, and as a result, entire families often attend together. On a staffing level, we have made a concerted effort to ensure that all program staff possess bilingual language skills. We recruit facilitators and assistants who speak the languages represented in surrounding neighborhoods, including Spanish, Vietnamese, Arabic, French, Somali and Amharic. Through various observations and reports, we have discerned that when staff communicates

in the preferred language of a customer, this customer feels more inclined to ask additional questions and is more likely to revisit the library with greater frequency. Since the staff largely remains the same week after week, returning participants see a friendly, familiar face on each visit. Furthermore, we have found that a free and open drop-in format is less intimidating to users, so we do not require pre-registration or even a sign-in sheet at the door. With fewer initial barriers to Plaza, we are still able to track participants' achievements through observational staff assessments, attendance stats based on visual headcounts, regular anonymous surveying of our participants as well as testimonials provided voluntarily by participants. By combining these specific quantitative and qualitative approaches with the open program format, we have seen a greater willingness of participants to return at a time that best suits their needs and schedule.



**Picture 4: Plaza participants seek computer help and use language-learning software to practice English.**

During Plaza, participants can work individually or in groups, with or without the assistance of a staff member. They also

have access to office supplies, print and media resources, laptop computers with Internet capability, word processing software and a color printer. The space is modular, with tables set up to form small work groups. In this setup, the goal is to create a collaborative environment rather than a traditional classroom setting. The intergenerational environment further encourages participants of all ages and backgrounds to interact with one another. Children have their own distinct area of the room, with books, toys, puzzles and games, as well as early literacy computers. The laptops and children's computers are certainly useful, and help customers improve their literacy across multiple formats. However, while the use of these resources is beneficial, it is not a requirement for success. The basic concept behind Plaza can be applied in a setting that lacks access to such technology. The Plaza is a dialogue-based program that promotes general communication in all programming aspects and focuses on creating networks and relationships within a community—a place where individuals can meet friends new and old away from home. In this sense, the most important aspect of Plaza is the community of people coming together to share expertise and resources.



**Picture 5: Three generations of participants working alongside each other at a table to create wearable crafts.**

*Plaza* is not a standalone program in that it offers a number of targeted activities that address specific needs within our communities. These include English Conversation Tables, artC (arts and crafts), Computer Help, *Your Life* sessions and Citizenship. These sessions are interwoven with the Plaza on a regular basis. DPL relies on the programming staff to supplement our knowledge and improve our assets and strengths, which provides an additional community resource. *Your Life* sessions bring in experts from the community to implement workshops related to the monthly theme. Our citizenship sessions are led by a local immigration attorney who discusses the naturalization process and the components of the citizenship test along with other pertinent information about immigration issues. In a creative and friendly environment, English Conversation Tables give users the opportunity to gain confidence and fluency in a second language. Facilitators use images to spark discussion on monthly topics using the Visual Thinking Strategies model further detailed below. Arts and crafts programs run concurrently to the English programs, freeing parents to concentrate while also giving children the opportunity to explore their creativity and practice their own communication skills. Finally, Computer Help programs bridge the digital divide by providing users with everything from very basic information to more advanced technical exploration.



**Picture 6: Focusing on relevant community topics, seen above is a Your Life session demonstrating basic bicycle maintenance.**

The Plaza programs regularly highlight different themes related to information literacy, such as Finance, Community, Health or Family. For instance, when a theme surrounds Finance, our facilitators in the Conversation Tables might introduce banking as a topic of discussion. Participants then gain useful vocabulary related to this vital activity, and perhaps practice a typical transaction (e.g. depositing a paycheck at their credit union). Meanwhile, in the Computer Enrichment sessions, participants might learn about online banking and practice checking their balance online. Furthermore, a

customer practicing their English skills with an online learning website can also ask for assistance in accessing their bank account online. By providing coordinated information across multiple programs, we have been able to help participants increase their confidence and self-sufficiency in dealing with important everyday issues in a new environment.

How do we know this approach works? Perhaps the clearest evidence is found in the stories our participants share with us when they return to the library. One recent story exemplifies everything we hope to see achieved through our programs. Susana, a 41-year single-mother of two, is the quintessential return customer. She first attended the programs to practice English, and has since gone on to become a United States citizen, passed the GED and learned how to use a computer. After achieving these goals, thanks in large part to Plaza, she was recently hired as a nursing assistant after a three-year search for employment. Success stories such as Susana's are why our programs were created in the first place. The real-world success of our participants is what drives the programming forward, and as it progresses we are continuously looking for new ways to advance these programs.

## Moving Forward

*“There was a young man from Ethiopia who was awaiting the arrival of his wife and seven-month old son. He told her he wanted to show his wife how hard he had worked on English so that she would feel excited to live in such a new and strange land, far away from her family.”*

—Helen, Facilitator for English Conversation Tables

“Plaza has completely altered the way I approach customer service. I’m constantly searching for new ways to engage our non-English speakers and new immigrants, knowing that traditional methods may be more exclusionary than inclusionary,” states Emily Hackett, a former L&L Branch Manager. Although providing content-based, traditional learning models was once commonplace, the new program landscape revolves around actively guiding participants in building strategies and developing tools towards increased self-sufficiency. Technology is a perfect example of this approach. With current technology constantly evolving, it is of less value to teach participants exact steps to use specific tools. Instead, our focus is placed on what a participant can do to overcome these obstacles while providing strategies to help them move forward. Supporting participants’ sense of identity while they are engaging with a new community is a critical success factor to our programs. As a result, we have recently incorporated several new strategies and tools to aid our participants in this approach.

One way we have begun building confidence and developing critical thinking is through a visual literacy tool that allows individuals to come together to create a narrative that connects their own personal experience and stories based off a visual message. This method is called Visual Thinking Strategies

(VTS). Grounded in over thirty years of research, VTS has been used in cultural institutions and schools across the country and internationally in various fields and disciplines. Whether it is helping future doctors read charts and diagnose patients more effectively, or presenting art images for the masses and facilitating a discussion, VTS has been an effective resource for a variety of purposes. From our perspective, the use of VTS perfectly complements the nonlinear approach that has suited the existing Plaza programs so well. By promoting communication and interaction, the program offers participants validation of their own perceptions and analyses as they examine new views and concepts. This has not only become an effective tool to develop communication but has also revitalized the Plaza by carving out a space for dialogue and engagement. For example, a typical Conversation Table program might begin with VTS by using an image from their surrounding community. Participants are asked to discuss the image while the facilitator offers new vocabulary to the group and encourages neutral observations that can be grounded back to the image. During this process, the conversation may then begin to naturally progress away from the image and towards a real world scenario, such as applying for a loan. In this way, like our other programs, the Conversation Table is directly driven by the needs of our participants.



**Picture 7: English Conversation participants engage in a VTS inspired dialogue.**

Having utilized this egalitarian approach in our Conversation Table programs, we see a great deal of potential for future programming. For an immigrant learning how to read a sign in a foreign country, or a refugee family trying to understand their new environment, visual literacy is an important skill that empowers both young and old in using their knowledge and experiences to deal with unknown situations. In this sense, the visual arts can serve as a bridge to adaptation, as immigrants reflect and make sense of their new surroundings, develop a better sense of self-understanding and become more able to engage with and appreciate people from other backgrounds (PCCY 2009). This shift towards using the arts as a vehicle in our approach to serving immigrant populations is due in large part to a developing program that will be able to serve multilingual and intergenerational audiences. The arts provide a common foundation for participants, regardless of background. The visual arts help immigrants build a new social network with peers using shared experiences and forge an identity within new communities (PCCY 2009; Stern 2008). Additionally, studies show a strong correlation between easy access to the arts and more positive civic-minded individuals

(National Endowment for the Arts 2007). The resources and tools provided in these library-programming spaces allow individuals to connect not only with other participants but to their community at large as well.



**Picture 8: To connect Plaza participants with their community at large, DPL often collaborates with other institutions. Seen above are two young Plaza participants exploring their creativity in a joint Denver Art Museum and DPL event.**

## Conclusion

*“New interactions and cultural encounters happen at the library every day, yet it is easy to miss opportunities for new dialogues to take place. Through our programs, immigrants and newcomers find in libraries a space where freedom of thought and choice is valued, and recognize that this is where they were coming to all along!”*

*-Pilar Castro-Reino, DPL Learning and Language Cluster Manager*

As local demographics continue to shift, a greater need arises to create a global community of minorities, immigrants and native-born citizens. Marginalized populations need to acclimate and integrate into a new culture, and native-born individuals need to adapt to changing community fabrics. Whether an individual is meeting a neighbor, community leader, service provider or local business owner, it is critical that the library remains a source of support and connection for the community. Our Plaza programs at DPL will continue to serve and adapt to the needs of our diverse populations, as they have been and always will be centered on our participants. Through the years, they have developed and evolved in an organic process based on individual and group needs. As diversity in the Denver metro area continues to increase, DPL does not want language to be a barrier to program access for any participant. Therefore, Plaza programs provide such a space for all ages, families and individuals to ignite their curiosity, foster creativity and allow participants to delve into explorations built on self-enrichment. The library should be a pillar of a community, serving not only as a connection to resources but also as a home away from home. The programs we provide help increase confidence and empower our

participants to have a voice in defining their new communities. We are a place where conversations between neighbors will arise, where a person pursuing a goal can get guidance and support from the community, and where in the process individuals are able to develop a stronger sense of self while feeling connected to the vast array of resources and information available at the library and beyond.

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# **NON-WESTERN STUDENTS IN WESTERN UNIVERSITIES: BRIDGING THE PLAGIARISM DIVIDE**

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## ABSTRACT

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Differences in culture, customs, languages, and religions and new academic expectations for research and academic writing present challenges for non-western students who are studying in western countries. Foreign students must be willing to adapt the western philosophy of education and to learn the rules that govern the usage of original ideas and words in text-borrowing, quoting, paraphrasing, summarizing, referencing, and citations. Western colleges and universities must recognize these differences and prepare these students with new knowledge and skills to help them succeed in their academic obligations at the beginning of their studies. Collaboration between professors and librarians to develop specialized anti-plagiarism pedagogies and campus-wide programs and outreach can increase awareness, improve language skills, and educate students.

**Keywords:** Plagiarism, Text-borrowing, Foreign Students, Asian Students, International Students, Academic Librarian, University, College, Higher Education, Non-western, Western

## NON-WESTERN STUDENTS IN WESTERN UNIVERSITIES: BRIDGING THE PLAGIARISM DIVIDE

The steady increase of “intercultural encounters in the classroom” globally (Payan, Reardon, & McCorkle, p. 275) is fueled by the enrollment of students who opt to study in countries other than their own. Many universities all around the world are offering students the opportunity to study abroad (for a year or a semester) through programs such as the International Student Exchange Program (ISEP, 2013); and other students continue to leave their homeland to pursue their education in a foreign country. According to the Institute of International Education (IIE), the number of foreign students studying in the United States continues to grow. From 1971 to 2001, foreign students’ enrollment in the United States almost doubled, increasing by 211,779 students, of which 54% came from Asia (Badke, 2002, p. 60). The most recent report of *Open Doors*, a publication co-sponsored by IIE and the United States Department of State’s Bureau of Educational and Cultural Affairs (BECA), noted that during the 2011/12 academic year, 764,495 students from foreign countries moved to the United States for schooling, a 6% increase compared to the 2010/2011 academic year. This is the sixth year in succession that there has been a rise in the number of international students, and a 31% increase from a decade ago (ILE & BECA, 2012). This “Globalization of education has increased the diversity of the student population in terms of ethnicities and cultures” (Martin, Rao, & Sloan, 2011, p. 89).

The majority of these students originate from nonwestern countries, with China leading, followed by India, South Korea, and Saudi Arabia. In some nonwestern countries, cultures, and languages are significantly different from those in Europe,

North America, Australia, and New Zealand. For some of these students, the teachings, customs, and ideas about text usage and borrowing that they bring with them sometimes conflict with western academic writing standards; consequently, some foreign students' work gets flagged for plagiarism.

Chen and Nai-Kuang cited Prochaska 2001, who stated that the plagiarism is a western word that only became popular with the rise of capitalism in modern society (p. 79). McLeod agreed, writing that

the modern notion of plagiarism was born at about the same time as two other ideas: the romantic notion of the single, original author expressing his inner most feelings through art, and the capitalist notion of private property. Ideas, words, and phrases are now (in what is surely a curious phrase) "intellectual property," to be trespassed upon only with permission of the owner" in the modern Western world. (p. 12)

Mundava and Chaudhuri (2007) further noted that written knowledge in western culture was not popular until the 1900s, since prior to that time, "people relied on oral traditions and folk stories," making "ideas and concepts" community property. According to Shi (2006), Asian culture relied on Confucius' theory in which it is common practice for knowledge to be freely available for everyone to use (p. 265). Chen and Nai-Kuang also cited studies by Brenna and Durovic (2005) and Sapp (2002) "on plagiarism by Confucius-heritage students which suggest that their culture of learning is in several ways at odds with the western approaches to learning" (p. 81). The Chinese educational system embraces Confucian influence, encouraging and rewarding students to use words directly from respected authorities (Martin, Rao, & Sloan, 2011, p. 90).

Amsberry (2010) noted that cultural, educational, and linguistic differences contribute to incorrect source use, which

leads to plagiarism. Academic librarians Badke (2002) and Mundava and Chaudhuri (2007) discussed cultural differences in relationship to understanding plagiarism among international students. McLeod stated that referencing styles are different. Chen and Van Ullen (2011) acknowledged that differences of treatment of authoritative texts and source referencing between western and nonwestern cultures can contribute to unintentional plagiarism. They noted that citing is not required as long as borrowed texts are in quotation marks (p. 223), unlike the western requirement for referring to the work of authors, whose rights to their ideas and written works make correct citing and referencing obligatory. Mundava and Chaudhuri (2007) also wrote that it is hard for foreign students to understand "the expectations for appropriate textual borrowing practices at American Universities" (p. 171).

This is further complicated by language issues and the students' inability not only to understand the nuances of language, but also to recognize the importance of paraphrasing, quoting, and citing of sources. Researching plagiarism, Park (2003) noted that "One group of students who regularly feature on the 'at risk' list is international students for whom English is not their first language....and arrive with less well-developed study skills (including note taking, essay writing and bibliography construction skills" (p. 480). Sarkodie-Mensah (2010, p. 198) noted that one Chinese student reported that some students hired test takers for the Test of English as a Foreign Language, a required exam to test English proficiency. Chen and Nai-Kuang's study of Chinese students' experiences and ideas concerning writing proficiency in English discovered that 44.4% of them admitted that they have difficulty expressing themselves in English. Their study showed that insufficient proficiency in English was a contributing factor to plagiarism (p. 85).

At an Adelphi university faculty senate meeting in which student plagiarism was discussed, a business professor voiced her concern about high levels of plagiarism in her class by international students and questioned admissions standards versus students' academic abilities. After much discussion to clarify procedures in admissions and students' abilities, it was determined that the language barrier and cultural differences are major contributing factors.

On college and university campuses in the United States and other western countries, academic honesty issues and plagiarism in particular continue to be an ongoing issue. Unfamiliarity to the western rules on citing and reference contribute to instances of unintended plagiarism by foreign students.

## **Understanding the Term “Plagiarism”**

Merriam-Webster's dictionary defines “plagiarize” as “to steal and pass off (the ideas or words of another) as one's own: use (another's production) without crediting the source,” and words such as “cheating” dishonesty” and “crime” are associated with the term (2012). For some Asian foreign students in the western world, plagiarism is a new term, and many of them are confused about its meaning. Shi noted that Chinese students in their native countries stated that “*piaqqie*” was a fairly new term to them, and it is the closest word to “plagiarism.” Japanese students stated that “*tooyoo*” is stealing of a physical thing, not words, ideas, or opinions (p. 271). In a survey of international students' awareness of the term “plagiarism,” Starkodie-Mensah (2010) noted that foreign students at Boston College were interviewed informally on their knowledge of plagiarism in their home country, where some did not consider plagiarism a problem leading to a criminal offense. For example, students from India claimed the requirement was to

take exams at the end of the year and that there was no need for discussions about academic integrity. Another noted that he is freer to use other people's ideas and works. A Chinese student indicated that it is not required to note the sources from which ideas and text are taken, students are not penalized for working on take-home tests together, and it is a humanitarian act to allow sick students to copy from other students. The concept of plagiarism varies from culture to culture. For example, a student from the Philippines noted that plagiarism is as a serious offense in his home country as it is in the United States, but intellectual property rights are not protected in Asia. Students from Singapore, Turkey, Saudi Arabia, and Congo stated that plagiarism is a "serious offense" and can lead to a failing grade or expulsion.

Although there have been reports in the media and articles about the prevalence of plagiarism among students from nonwestern countries who are attending western universities, in a study of acculturation and plagiarism, Martin, Rao, and Sloan (2011, p. 94) concluded that "Asians *do not* plagiarize more than other students, thus, disconfirming the stereotype." Furthermore, Mundava and Chaudhuri (2007, p. 171) noted a study done by the University of Minnesota that contended that the "sharp shift in tone, word choice, or grammar usage" among non-native speakers' writing creates more attention than their native peers, even though the latter were cited for 85% of all pedagogical deception.

These differences, cultures, and teachings of some of these students create challenges for administrators, professors, and librarians who are concerned about referencing and citations, and thus may lead to unintentional plagiarism. In their respective countries, group study and sharing and using ideas and information are often the norm, but in the United States, these actions are viewed as serious offenses when done improperly. Plagiarism can be committed intentionally when

someone is aware of the rules and purposely passes another person's written work off as his/her own. But plagiarism is also often unintentional; someone who is unfamiliar with the rules of referencing and citation may simply neglect to or give the author credit. Unintentional plagiarism is more common among some English language learners who have not been taught these citation rules and consequently do not recognize that in the West one must cite the source from which he/she quotes or paraphrases.

Chen and Nai-Kuang (2008) stated that one cannot assume that the study of the "ethnic/cultural backgrounds" of the "second/foreign language learners" can predict whether students will plagiarize and that the process involves studying "personal, situational, and cultural" issues (p. 81).

In my experiences working with international students, I have noticed that in addition to the language barrier, some have difficulty understanding and comprehending their assigned English readings. I often have students from Asia and Saudi Arabia who follow up with me several times after an ESL library information literacy class. In some instances, a few felt comfortable enough with me (or perhaps can relate to me because I am foreign-born) to confide that "English is so hard." One student even went a little further, telling me that although she had read the articles over and over, she still had problems comprehending the content.

McLeod stated that treatment of authoritative texts can vary in different cultures. For example, a Chinese student noted that he was confused between the western and nonwestern writing rules regarding text borrowing and usage. He was instructed by his western instructor to "be yourself," to write in his own voice, whereas in his culture, it is customary to show "modesty, self-effacement, and deference to authority" (p. 12). In addition, Shi (2006, p. 271) noted that Korean students showed

confusion in understanding text usage. “*Pyojeul*,” their term for stealing, depends on the usage context and setting. For instance, to them, using another’s text from journals verbatim is considered stealing but taking ideas from the Internet or books for educational purposes is not. In addition, Chen and Nai-Kuang (2008, p. 86) stated that students’ ideas differ on text borrowing. For instance, in the scenario “copying two lines of text from an encyclopedia,” 74.5% noted that it is not plagiarism if it is done for a published work, while 49% of them thought it is plagiarism when the copying is for a class assignment.

Cultural practices in their homelands, some foreign students do not subscribe to the idea of ownership of intellectual content and therefore partake in text borrowing without citing. For example, McLeod (1992) noted that “Students from certain Middle Eastern, Asian, and African cultures are baffled” (p. 12) at the concept that one’s ideas can be considered individual property because in their cultures, it is the opposite: No one owns words and ideas. They believe that words and ideas are not something someone can take ownership of, and therefore, words and ideas are available to everyone. According to Shi (2006), Asian students are taught and believe in shared ownership and collaboration of ideas (p. 242).

The Times Higher Education (THE) stated that writing research papers and citing sources are uncommon among international students (2011). To them, research writing is to copy text verbatim from what they have read (Marcus, 2011). More respect and honor are bestowed on the original when texts are copied verbatim compared to paraphrasing them. Amsberry (2010) wrote that copying authors’ words signifies respect, and Park (2003) agreed that in nonwestern countries, “imitation is indeed the highest form of flattery.” When confronted about a text-borrowing plagiarism incident, a Chinese student at Syracuse University answered that in his

culture, it signifies honor to the author (Marcus, 2011). Moreover, it is highly common for students in nonwestern countries to learn by memorization. In some cultures, students in their native lands are rewarded with superior grades and are deemed notable when they use the exact words, text, or ideas of prominent citizens without referencing the authors.

Chen and Nai-Kuang Ku surveyed 235 Taiwanese students (51 males, 184 females), all English majors who were enrolled in second-year English composition classes at four Taiwan urban universities about their understanding of plagiarism, and although almost three-quarters revealed that “copying verbatim from the textbook [is] plagiarism, when it came to copying verbatim from the text with the addition of one’s own ideas,’ only 17.7% said it was plagiarism.” Furthermore, the authors presented 12 scenarios, one of which inquired about students’ perceptions relating to cultural factors and text-borrowing. Most of the responses for the definition of plagiarism were similar to the western view, although “one student included a note saying, ‘Plagiarism is not necessarily bad.’” While students defined plagiarism according to the western idea, answers to the other scenarios indicated confusion in their understanding of text borrowing. Most of them felt that “copying word for word” is plagiarism, but they also felt that it is “acceptable to paraphrase or use a few words or ideas without attribution” (p. 86).

Chen and Van Ullen (2011) quoted a Chinese student who stated that academic writing is not common in China and therefore she does not have much experience with it. Furthermore, she said, “And America and China have totally different discipline and rules about academic writing” (p. 223). The authors noted that students are not confident about articulating or paraphrasing from sources into their own words and language (p. 223) because tests and memorization are the forms of assessment with which they are most comfortable.

## **Other Reasons that Foreign Students Plagiarize**

Like many western students, international students reported that access to the Internet is a major contributor to instances of plagiarism (Chen & Nai-Kuang, 2008). Students stated that professors in their countries do not enforce anti-plagiarism rules. About 74% claimed that “lax enforcement in turn might have served to nurture the seeds for plagiarism, as it became a practice associated with ‘low risk’ and ‘high reward’” (Chen & Nai-Kuang, p. 86). Other contributing factors are external pressure such as their parents’ expectations for success.

## **Recommendations**

Although foreign students attending western academic institutions try to learn and use the western writing styles, they often revert to their conventional learning styles, which do not follow western writing rules (Chen & Nai-Kuang, 2008). Therefore, these students, especially those for whom English is their second language, must be presented with opportunities not only to improve their English and writing skills, but also to learn and adhere to the research guidelines and writing rules and practices prescribed to by western educational institutions.

First, universities and colleges in the western world need to understand the causes of plagiarism among international students studying in their countries. Maudava and Chaudhuri stated that collaborating with various campus departments can increase academic integrity among international students. It is vital that academic institutions provide specific instruction and outreach for international students about the requirements of writing and research in western universities. Zimmerman (2012) quoted Burke, who stated that since the library is the

ideal place for research, then academic librarians should be involved in the process. Describing an anti-plagiarism workshop, Madray (2006) also noted the importance of collaboration between librarians and teaching faculty. Academic librarians are key players in this enterprise and must collaborate with their faculty peers to deliver the appropriate lessons to help these students succeed. Library information literacy classes can be an avenue to preventing plagiarism. Academic librarians are often well positioned to disseminate guidelines about pedagogical and ethical usage of information by including anti-plagiarism component in information literacy classes.

Working closely with teaching faculty who are more familiar with their own students' skills and weaknesses, librarian can create and integrate assignments that will teach students to correctly extrapolate important concepts from research and apply them to their own academic writing. This might include teaching students to synthesize material and properly quote and cite their work.

Since writing research papers is not common in nonwestern countries (Chen & Van Ullen, p. 223), western institutions of higher education might provide compulsory special and intense classes or programs to teach international students the mechanisms of western academic writing style and citation. For example, they could offer a credit-bearing research writing course geared to English as a Second Language (ESL) students. McLeod noted that "international students with different cultural notions about sources do not need admonitions and disciplinary action; they need further help with their learning, further instruction in the social behavior of those engaged in scholarly conversation. In some cases, they also need our sympathy and our intervention with their teachers" (p. 13).

Each semester, the Adelphi University Writing Center (located in Garden City, New York, with satellite locations at the Manhattan campus) offers workshops and individual tutoring for all students on the mechanisms of academic writing that includes paraphrasing, quoting and citing. These workshops are not mandatory and are available to everyone, both native and foreign students. As of the fall of 2012, the international student population accounts for 3.1% (140 students) of 4,545 undergraduates and 11.2% (182 students) of 1,629 graduate students. To make international students proficient in the western rules about text borrowing and academic writing styles and requirements, similar classes tailored to their needs should be compulsory.

Higher education institutions could provide venues for these students to get acclimatized to western culture and language. In an article on mentoring programs at Curtin University in Australia, Pearce (2012) noted that “having a domestic student as a mentor can be a very positive practice for opening up social exchange opportunities with host nationals” (p. 3). The author further remarked that this early involvement supports academic success. As a reference librarian, I have observed international students conversing with native students about American culture, holidays, and religion. I began to think that this might be an avenue to encourage western students to mentor foreign students outside the classroom in an organized way, perhaps via International Student Offices and partnerships with teaching faculty. Incentives for western students to mentor can be tied to classwork and assignments for extra credit; field work or internships for programs such as ESL in teacher education; extracurricular activities for departments such as international students services; and monetary compensation. Academic librarians at C.W. Post campus have been involved in a similar mentoring program in which librarians partner with international students to enlighten them about American culture and academic expectations.

To help safeguard against plagiarism, international students studying in western universities must be willing to learn and adopt western conventions of academic writing and research. Students in nonwestern countries are not allowed to challenge their professors or express their thoughts (Badke, 2002, p. 3). For them to survive academically in schools in western countries, they need to be introduced to a different educational philosophy. Furthermore, establishing cultural reorientation programs that include the aforementioned-anti-plagiarism techniques will reinforce the necessary skill of distinguishing one's original work from that borrowed from others as defined by and accepted in western institutions of higher education.

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**SUPPORTING NYU'S  
WORLDWIDE USERS:  
ACADEMIC TECHNOLOGY  
SERVICES FOR THE GLOBAL  
NETWORK UNIVERSITY**

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**NEW YORK UNIVERSITY**

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## ABSTRACT

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The globalization of higher education has been growing rapidly in recent years. As New York University (NYU) develops its Global Network University, opening degree-granting portal campuses and expanding academic centers worldwide, the need for integrated support at these sites is growing. With this international growth comes the challenge of supporting students, faculty, and staff that are thousands of miles away from the central academic technology support system in New York that provides training, troubleshooting and service management. To ensure that the NYUAD campus could effectively support academic technologies, a new staff position was created in New York within the Digital Studio at Bobst Library and a new support model was developed. Based upon our experiences, we've outlined the challenges encountered, successful strategies and proposed best practices that can be used to improve this new international support model for NYUAD, our Global Network University and other higher education institutions with portal campuses around the world.

**Keywords:** international university, global, higher education, new york university, new york university abu dhabi, support, academic technology

# **SUPPORTING NYU'S WORLDWIDE USERS: ACADEMIC TECHNOLOGY SERVICES FOR THE GLOBAL NETWORK UNIVERSITY**

The globalization of higher education has been growing rapidly in recent years. According to a report by the Observatory on Borderless Higher Education, "Since 2006, the number of international branch campuses in the world have increased by 43 percent" (Becker, 2010). As New York University (NYU) develops its Global Network University, opening degree-granting portal campuses and expanding academic centers worldwide, the need for integrated support at these sites is growing. NYU's portal campuses are more than study abroad sites; they are distinct, fully developed campuses that comprehensively support their students, faculty and staff. Portal campuses are degree granting institutions, and it's possible for students to spend their entire university career at one of these locations. The study away sites complement these portals by allowing students to travel beyond the main university centers in order to fully develop as global citizens. This networked system of study away sites and portal campuses allows students to move seamlessly between locations.

NYU Abu Dhabi (NYUAD), the University's second portal campus after New York, opened its doors in 2010. Beginning with a class of approximately 150 students from around the world, the campus is expected to grow to over 2000 graduate and undergraduate students. In fall 2012, academic centers opened in Sydney, Australia and Washington, DC, and will be followed by another portal campus in Shanghai, China in 2013, for a total of fourteen global locations. With this international growth comes the university's challenge of supporting students,

faculty and staff that are thousands of miles away from the central academic technology support system in New York that provides training, troubleshooting and service management.

To ensure that the NYUAD campus could effectively support library and academic technologies, a new staff position was created in New York within the Digital Studio at Bobst Library and a new support model was developed. The Digital Studio is a collaboration between NYU Libraries and Information Technology Services (ITS), and supports digital scholarship, research and teaching by providing consultation, training and tools. ITS staff and librarians provide user support to faculty, staff and students for the academic technology services offered by NYU. These services include: learning management systems (LMS), video streaming, file management systems and digital publishing platforms. The new position, Digital Studio Technology Specialist, serves as a liaison between the Digital Studio in New York and the Library at NYUAD, collaborating with the Digital Technologies and E-Learning Librarian and academic technology staff in Abu Dhabi to support Abu Dhabi-based users.

At NYUAD, the decision to integrate library and academic technology was a natural fit, drawing inspiration from the established Digital Studio/Library relationship at Bobst. The NYUAD academic technology office is housed in the library and academic technologists and librarians work together on a daily basis. The Digital Technologies and E-Learning Librarian is indicative of this relationship. This role partly serves as a “typical” librarian, conducting information literacy sessions, doing collection development in liaison areas and working at the Library Information Desk. Conversely, this role also supports academic technology initiatives, including oversight of the university’s learning management system, support for the university’s streaming media service and maintenance of the library’s web presence and catalog interface decisions. The

Digital Technologies and E-Learning Librarian reports to the Assistant Director for Library and Academic Technology, instead of to the Library Director as the other librarians do. While it's by no means unheard of for libraries and academic technology departments to operate as one unit, this organizational structure is not as widespread as one might think. According to a summary of the 2008 *Core Data Service* report by EDUCAUSE, only 14 percent of libraries in two-year institutions and 18 percent of libraries in four-year institutions follow the converged information technology/library model (Massis, 2011).

As part of this collaborative global support model, the Digital Studio Technology Specialist provides training for faculty before they travel to Abu Dhabi, represents NYUAD on New York-based service teams, and communicates important service updates and changes to the NYUAD library administration. The NYUAD Library's Digital Studio models its services and tools after the Digital Studio in New York in an effort to provide a similar work environment. Abu Dhabi staff provide support from the NYUAD Digital Studio to faculty by both familiarizing those who are new to the NYU system with the tools and services available to them and supporting NYUAD faculty as they travel globally for research and teaching.

Providing global support poses many challenges, including: training remotely, appropriate network speed limitations, time zone differences, effective communication of service changes, and communication tools for videoconferencing and remote training. Now three years into the partnership, we have discovered through flexibility, close consultation and creativity that there are many effective strategies for global support. Through our partnership, we are able to offer high-touch service to our users and provide one-on-one training prior to the start of each semester. Conversely, some tactics have been

less successful, and we have learned from those. Based upon our experiences, we have outlined the challenges encountered, successful strategies and proposed best practices that can be used to improve this new international support model for NYUAD, our Global Network University and other higher education institutions with portal campuses around the world.

## **Challenges in Supporting our Global Users**

Global support by definition comes with its own set of scenarios, and one of the most challenging aspects of providing assistance is trying to meet the needs of our students and faculty as they move across locations. Faculty and students are continually traveling between campuses, often thousands of miles away from the central support center in New York City or the portal campus in Abu Dhabi. Additionally, students and faculty routinely travel for research to locations without an NYU site that can provide at least some level of basic support. Some continue their studies while at home over the summer, returning to locations that may lack a suitable network infrastructure or computing environment. There are numerous obstacles, some of which we anticipated and others that evolved over time. The Digital Studio Technology Specialist position was created to address these needs. While this role has proven to be an essential component to providing seamless global support, broader issues have arisen that even this position could not mitigate. Network limitations and efficient equipment procurement are just a few examples of these larger obstacles.

An example of this emerged during a summer language learning program. Students, away from Abu Dhabi for the summer, were asked to complete an online course that helped them develop their English language skills. The course was run

through Blackboard, the university's learning management system at the time. Part of the curriculum required students to record practice sessions using Audacity, a free audio editing and recording program, and then upload the files to the course site. Some of the students were in areas without a reliable network connection, and encountered roadblocks. Additionally, some had technical problems using the Audacity application and could not visit a NYU support center in person. Remote troubleshooting helped in some situations but wasn't entirely effective. One lesson learned was that the Digital Studio in Abu Dhabi should offer in-person workshops and hands-on training or an online video tutorial before the summer break, so that all students and faculty are familiar with the technology while they still have access to face-to-face help. However, the connectivity issues are outside the scope of our support capabilities. Can we ensure that all faculty and students have the required support, equipment, software and infrastructure they need in order to carry out their research or continue their studies? If not, do we instead modify requirements and expectations to accommodate the various scenarios? These are only a few of the broader questions that a global university must consider and serve to illustrate scenarios for which we have not yet found resolutions.

One of biggest obstacles in creating a seamless global experience for our users is the variances in network speed between locations. The use of some tools and applications, such as video streaming and Learning Management Systems, are dependent on a certain level of infrastructure and connectivity. In locations where infrastructure has not yet matured, tools and applications, such as video streaming technology, that work seamlessly in the United States will not operate as well. This may result in users gaining access to new technologies at different rates, while networking and other deployment issues are addressed at each location. If each location is not using the same technology, it could create disparities in the seamless

global experience. Along with this challenge comes the issue of managing expectations. If faculty and students find that certain applications that they have been using in New York are lacking in Abu Dhabi, how do we meet their needs? We've found that an effective response involves a high-touch environment supported by staff, which in turn creates other challenges around workflow, staff availability and scalability.

Another complication is the time zone and workweek differences among global sites. For example, the common workweek in the Middle East is Sunday through Thursday. American holidays are not observed, so classes are sometimes in session while U.S.-based classes are not and vice versa. Our Abu Dhabi campus is eight or nine hours ahead of Eastern Standard Time, depending on daylight savings time. Because of these differences, the two portal campuses only share three working days. When work weeks and hours aren't aligned, it can be complicated to connect with support teams at other global locations. While the support team at a given location does its best to help resolve any issues, it's likely that some issues will have to be escalated to the main support center in New York. When that center is closed, users can be left in the lurch. If critical issues aren't addressed by staff outside of their normal work hours in one location, it's easy for an issue to drag out over several days of communication as each party keeps missing the other. As NYU continues to develop its 24/7 support model, these challenges will lessen over time. The addition of more support staff in the overnight hours in New York, a new online ticketing system, and a new online knowledgebase are recent changes to ensure that the non-New York locations have the same resources to provide support as the faculty, staff and students located in New York.

Communication can often be a struggle within institutions, or even departments, that have only one physical location. Ensuring that information is disseminated to all of the right

parties at a global campus can be even more challenging. The office conversations that keep everyone apprised of new developments or sudden discoveries don't always make their way into an email or videoconference agenda. Likewise, it's easy to mistakenly assume that some information is widely known among all staff regardless of location and thus doesn't need to be shared. This can leave some staff unintentionally uninformed and may create confusion when the lack of shared information becomes apparent. Making sure that everyone on the team has the same knowledge and understanding takes persistence and time, and can easily be overlooked. One solution that we have found helpful is to ensure that Abu Dhabi staff are subscribed to any communication channels that New York-based staff routinely use, including listservs, Google Groups or email aliases. Additionally, Abu Dhabi staff are members of New York-based committees, participating in those meetings via Skype. This requires that the meetings be scheduled in the early morning hours in New York and after normal work hours in Abu Dhabi. These non-traditional work hours, though not ideal, help keep everyone apprised of developments and initiatives in those specific areas. These are just a few examples of the communication initiatives that need to be developed early on in order to ensure a successful support model.

Along with global growth comes the new identity and awareness of an international campus that has moved beyond the traditional boundaries of a single location. For those who have worked at an institution whose mission has been to provide support to students, faculty and staff at a single location, the switch to considering other global locations in the decision making process can take some getting used to. Shutting down an application, such as the library catalog, to update or reconfigure the system can no longer be scheduled overnight, because that may be in the middle of a workday at another location. Creating and fostering that global awareness

takes time, patience and persistence. The advantage of this global awareness among service teams for tools that are used internationally is a benefit to the entire user community. For example, time zone sensitivity in a learning management system will help ensure that students and faculty are working with a system that is aligned with their workday. Creating site-specific resources in our LMS and other academic technology systems also ensures that everyone's support needs are considered regardless of location. We modified our LMS sites to include course-specific research guides that reflect the specific class curriculum instead of the more generalized research guide geared toward New York-based students. This allows for focused research content to be available at the point of need, along with the tutorials and assistance required to use it. Additionally, the library offers a suite of language learning software, including Mango Languages and Rosetta Stone, to help our students' linguistic skills as they move across global locations.

Providing a seamless experience for our users becomes difficult when the global site has its own systems and practices. The start-up campus has the unique opportunity to form its own policies and procedures as it determines the best ways to serve their students, faculty and staff. Sometimes, these policies may not be in line with the established campus because there are specific circumstances that are unique to that particular location that dictate a change in the way things are done when compared to other portal campuses. Building an institutional relationship with the service teams at the home institution provides challenges when the service model developed for the larger institution does not fit the culture at the portal institution. Service models built to provide support for tens of thousands of users at the home institution do not take into account the reality of the other, smaller global locations serving dozens or hundreds of users. Conversely, with their smaller size and fewer faculty, the portal campuses

are able to provide high-touch service, classified by a high level of personal interaction with the user, that is not scalable for the home institution. As the portal campuses at NYU evolve, they develop their own identities and models that work for their institutional culture, while also staying aligned with the mission of the home institution.

Institutions often create their own information-sharing strategies as a result of their specific environment and user needs. As a result, information is not disseminated in the same way at the various portal sites. The New York campus has a large number of people working on each academic technology service, such as Google Apps for Education, the learning management system, and the video streaming service. We have found in New York that relying on “informal” communication tools, such as email and chat, among different departments, let alone different locations, means that a lot of requests get lost. Without the tracking features that an online ticketing system provides, we cannot ensure a request is answered. Therefore, communication and documentation amongst the teams and across ITS and the Library as a whole is largely distributed through the institutional wiki in order to provide a central location for support resources. For the New York staff using the wiki daily, it is second nature to look there for information. The staff in Abu Dhabi and at other global locations is, by comparison, much smaller and thus communicates via informal conversations and other methods as they interact throughout the day. Using the wiki is not intuitive as it is rather formal and impersonal in their context. Therefore, staff in Abu Dhabi may miss this wiki-based information and updates about the various services and can feel that they do not have all of the knowledge they need. Getting into the habit of checking the more formal information resources will provide staff at global locations with the documentation they need to support their users.

The workflow for resolving client issues follows a similar pattern. In New York, interaction with clients is done most frequently via an online ticketing system, to effectively track the numerous daily support requests and responses to them among the various team members. In Abu Dhabi, clients visit their Digital Studio in person to ask for assistance or send an email to the staff directly. Transferring the requests that require a higher level of support to New York via the online ticketing system does not come naturally; one's instinct is to forward the email to the service team, or email the service team members directly. If requests are not recorded in the formal tracking system, they can get lost or overlooked in the volume of email received every day.

Lastly, in creating all of these shared services for faculty and students as they teach and learn at the various sites, we assume they have basic technology skills. However, depending on the users' background, this may not be the case. Through the working partnership with the Digital Technologies and E-Learning Librarian and the Digital Studio Technology Specialist we are able to schedule one-on-one consultations with the faculty in New York and Abu Dhabi, attending to their individual needs, although this model will not be scalable as the campus expands. Other sites may not have staff available to provide such consultations, and faculty and students may travel to areas without an academic support center. We will need to develop new methods for ensuring competency in the academic technologies used at the University, regardless of the user's location. One option is to insert ourselves into any type of campus orientation session and provide an academic technology overview. Another option would be to create an online course that familiarizes students and faculty with the resources and support teams available to them. Additionally, we should continue to develop and promote our online tutorials and the opportunities available to them for in-person, one-on-one assistance.

## **Successful Strategies**

While providing global support to our users certainly presents many challenges, we have discovered several approaches that succeed quite well. One of the most helpful initiatives was creating the Digital Studio Support Specialist position, a role that serves as a direct line of support in New York for academic technology related matters in Abu Dhabi. Having one person that can field questions, represent global needs and interests and keep an ear to the ground for important information has proved essential. Creating the partnership between the Digital Studio Support Specialist in New York and the Digital Technologies and E-Learning Librarian in Abu Dhabi has ensured a safety net of support.

When developing a service model from the ground up, and in an environment that is still in flux, there are personal traits that have proven beneficial. Having a certain comfort level with ambiguity and a willingness to adapt to an ever-changing environment has helped, as has possessing the initiative to identify issues as they arise and come up with solutions. Some of the support issues that we encounter have never surfaced before, so an ability to think creatively and consider many different approaches is important. Having a broad knowledge of various technology tools and the willingness to experiment with new technologies can help to solve many issues that arise. Being able to work independently, yet knowing when to include others from the global team is also essential.

Though not always feasible, another way to ensure a successful support model is to immerse decision-making employees into the alternate location's work environment as much as possible. It's easy to work within the silo of your own location and to lose sight of the larger organization's structure and workflow. We have found that the best way to assimilate global teams is

to have staff occasionally visit and work in each other's locations. This gives the employees a better sense of how the organization is structured and how this affects work in their location. They have a chance to experience the routines and work patterns of their sister organization, elements that may directly affect how objectives are ultimately achieved. Additionally, such visits create stronger collegial bonds and foster a greater shared sense of purpose. Ultimately, it's these things that enable staff to provide the greatest level of support to users. When travel between locations is not possible, scheduling regular meetings via videoconference can fill in the gaps and continue to promote teamwork.

Another aspect that has helped strengthen a solid global support environment is the creation of a high-touch environment via our support teams in both Abu Dhabi and New York. New York-based faculty that will be working in Abu Dhabi, or Abu Dhabi faculty traveling back to New York for a semester can receive hands-on assistance at each location before they travel. This may include support with setting up course websites in the learning management system, an overview of the tools available at each location or consultations to help determine which tools meet their academic technology needs. The goal is to create a system where faculty receive help regardless of their location via a seamless process. The initial support contact briefs the destination staff on the faculty needs, assess which needs have already been met, and what further assistance may be required, as faculty are guided from one support team to the next. One of the challenges with this framework is how to extend this high-touch environment as our developing portal campuses grow. It's easy to offer highly personalized service to a small community, but scaling this to meet the needs of thousands (as opposed to hundreds) of future users is something we are continuing to develop as an organization.

## Best Practices

Based upon our experiences in providing seamless global support across sites that we have outlined here, we have come up with a set of best practices that work for our institution. We believe that we can extend these best practices to our other portal campuses as service support continues to expand to these locations.

- **Pilot services with faculty and students in Abu Dhabi and the other global sites.** This allows the service teams to discover any performance or implementation issues early in the project cycle. The needs of the users at each site can be voiced and recorded by the service team during the assessment phase of the project. Realizing each location's distinct requirements early on allows service modifications and developments based upon those needs to be made, and ensures the seamless global experience that NYU strives to provide.
- **Continue developing online tutorials and remote training opportunities.** These will be helpful not only for our portal sites, but for all our users. As everyone may not be able to attend in-person workshops, online tutorials will allow people to learn at their own pace or to focus on learning more about a particular aspect of the technology at a granular level. This will help solve the challenge of ensuring a comfort level with technology, as well. Additionally, synchronous training webcasts across locations or live streaming of technology tool workshops will help reach our global users.
- **Develop strong communications methods.** Establish and use those methods even if they are not part of the daily culture at a particular location (Niederman & Tan, 2011). By establishing strong methods and practices of communication early on, we can work to

make them part of the overall organizational culture and ensure that there is a common understanding among staff at all locations. In addition, we must work to find ways to share knowledge that may be anecdotal and specific to one site. This information can have a large impact on a project, but it may not be easy for the project team to discover. By incorporating this information into our internal knowledge repositories, we can ensure all of the information necessary for successful service implementation and support is available to all service providers, wherever they work.

- **Develop good partnerships to assist with support issues.** To resolve service and support issues that cannot be handled at the local level, we need a clear path for escalating problems to the various service teams. By developing relationships among these individuals and groups, more staff will be aware of each portal site's idiosyncrasies and therefore be able to resolve the issues more quickly. Good working relationships among global colleagues have proven critical to creating a strong support model.
- **The immersion experience.** We have found that our immersion travel experiences have been invaluable. The chance to spend time at each other's campus allows us to learn about day-to-day issues that we would not otherwise know about, to develop the partnerships that are valuable in providing support, to participate in in-depth training and to learn the methods each site uses to support their users. These experiences foster teamwork and collaboration between in-person visits (Nunamaker Jr., Reinig, & Briggs, 2009) and lead to the success of the global support model. For us, two-week periods seem to be ideal. This allows enough time to schedule necessary meetings and trainings and participate in daily life at the other location without becoming overloaded with information.

New academic technologies are continually introduced at NYU. The experiences and challenges we have outlined here help those implementing and supporting these services keep global needs in mind. As new modes of communication and remote training methods are developed, we can use them to further strengthen the global support model.

NYU continues to expand its Global Network University, and the number of users at the portal campuses continues to grow. We will no doubt face additional challenges and difficulties as this occurs. By implementing a strong global support model that allows for flexibility and scalability, and by continuing to adopt and develop best practices, we will be prepared to face these challenges. The collaboration between the Digital Studio Support Specialist in New York and the Digital Technologies and E-Learning Librarian in Abu Dhabi has proved extremely beneficial for the global support model. Faculty members profit from personalized service regardless of location, and a sense of community is fostered among the international support teams. While this relationship is still evolving, it's a critical component of the support model that is worth considering for any institutions with worldwide users.

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# **AROUND THE GLOBE: LIBRARIANS ON THE INTERNATIONAL SCENE**

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# **CULTURES OF ACCESS: DIFFERENCES IN RHETORIC AROUND OPEN ACCESS REPOSITORIES IN AFRICA AND THE UNITED STATES AND THEIR IMPLICATIONS FOR THE OPEN ACCESS MOVEMENT**

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## ABSTRACT

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Open Access (OA) refers to free, online access to peer-reviewed scholarship. Many OA proponents view OA as a potential mechanism for reversing inequities in information flows between industrialized and non-industrialized nations. The “green road” of OA (self-archiving in an OA institutional repository) has seen substantial growth in African nations where there have historically been chronic problems both with access to scholarly and scientific materials and participation in the larger scholarly and scientific community. For this study I examined the rhetoric used by OA institutional repositories and what this rhetoric may say about different “cultures of OA”. I conducted textual analysis of 46 websites of OA repositories in the United States and 14 Sub-Saharan African nations. Analysis of the specific rhetoric used to present the OA repositories reveals differing views on the importance of OA in terms of cultural ideas about information control, access to information, and social capital.

**Keywords:** Open Access; Institutional Repositories; Scholarly Communication; Sub-Saharan Africa; Textual Analysis; Culture

## Introduction

Open Access (OA) literature is, “digital, online, free of charge, and free of most copyright and licensing restrictions” (Suber, 2012, p. 4). The OA movement came into full force with the 2001 *Open Letter to Scientific Publishers* signed by tens of thousands of scholars worldwide which called for “...the establishment of an online public library that would provide the full contents of the published record of research and scholarly discourse in medicine and the life sciences in a freely

accessible, fully searchable, interlinked form" (Public Library of Science, 2001). While the focus of OA was originally on these disciplines, interest in OA quickly expanded beyond these into nearly all scholarly areas. The impact of OA has been felt both nationally and internationally. *Nature*, *Science*, *The Scientist*, and the *Wall Street Journal* all ranked OA among the top science stories in 2003 (Willinsky, 2006, p.1). Additionally, many proponents of OA have seen OA as a potential mechanism for reversing inequities in information flows between industrialized and non-industrialized nations.

Two roads for OA have developed: the "golden" road of OA journals and the "green" road of archiving articles in an OA institutional repository. The OA movement adopted this terminology to distinguish between methods of OA delivery after the terms were coined by Stevan Harnad (Suber, 2012, p. 53). OA institutional repositories are online collections of freely accessible articles organized and managed by an institution such as a research center or university and containing the intellectual products of scholars (and sometimes students) associated with that institution. Most OA institutional repositories were originally limited to peer-reviewed research articles and their preprints; however, some repositories have expanded to include other content such as dissertations, datasets, or other content (Suber, 2012, p. 52). Additionally, there are distinctions between "*gratis* OA", which removes price barriers alone, and "*libre* OA" which removes at least some permission barriers (Suber, 2012, p. 6). Although there has been a rise in OA consciousness around the globe, there has also been a rise in the tendency to equate OA exclusively with OA journal publishing – highlighting the golden road over that of the more heavily traveled green road – despite that self-archiving in an author's own university Open Archives Initiative (OAI) compliant depository is the fastest and most sure way of providing OA access and content (Harnard et al., 2008). The OAI Protocol for Metadata Harvesting (PMH)

makes separate repositories interoperable thus allowing users to search all repositories at once (Suber, 2012, p. 56). Despite the growing attention and examination of OA in general, there is still relatively little literature on OA and its potential for libraries and scholars in Africa where there continue to be chronic problems with lack of access to scholarly and scientific materials primarily due to economic and technological limitations. While Sub-Saharan African countries have been slower to produce actual OA journals than other parts of the world (Bowdoin, 2011), there appears to have been substantial growth and success in the starting of OA institutional repositories in Sub-Saharan African universities.

While OA is relatively easy to define and examine, the concept of culture is, in many ways, the opposite. Centuries of academic, commercial and political discourse have defined, re-defined, analyzed, politicized and often sought to control that often nebulous aspect of human beings' lives. There is the narrow, intellectual concept of culture as being that related to the humanities (arts, literature, music, etc.) while there is also the much broader, anthropological sense of culture as a way of life (McGoldrick, 2007). Additionally, the cultural rights that are enshrined in Article 27 of the *Universal Declaration of Human Rights* state, "Everyone has the right freely to participate in the cultural life of the community, to enjoy the arts and to share in scientific advancement and its benefits," (United Nations General Assembly, 1948). Yet, that concept of just what is the "cultural life of the community" and what it means in terms of rights for both individuals and communities, has witnessed a constant battle of negotiation by scholars and officials in the international rights regime (Poppeliers, 2010). Gannon (2008) has pointed out that there are so many numerous, expert definitions of culture, with so many variations therein, that the concept of culture is itself a paradox and one that calls into question the very meaningfulness of the term itself (Gannon, 2008, p. 19) while Mohammed (2011) has

argued that “the very idea of the existence of culture is in serious need of revision” (p. x). Despite this, for the purposes of this chapter, I will be using an approach to culture similar to that of the cultural anthropologist, Clifford Geertz (1973):

The concept of culture I espouse...is essentially a semiotic one. Believing, with Max Weber, that man is an animal suspended in webs of significance he himself has spun. I take culture to be those webs, and the analysis of it to be therefore not an experimental science in search of law but an interpretive one in search of meaning. It is explication I am after, construing social expressions on their surface enigmatical. (p.5)

In short, I have chosen to use the term culture in terms of our individual and collective histories and upbringings that impact and affect the way we make sense of, and interact with, the world.

Due to my ongoing interest in OA and the OA movement and my long-standing interest in all aspects of culture, nebulous as that area can sometimes be, I have been interested in the particular ways that OA is talked about within different communities and cultural groups (which could be defined as subcultures or micro-cultures) and the ways OA is adopted or rejected within those groups. Thus, my research question for this study was “What can the rhetoric used by institutions in Africa and the United States to describe institutional repositories indicate to us about the internationalization of the OA movement and its impact on local or national scholarly micro-cultures?” In order to answer this question I also choose to look at ways in which the rhetoric represented in the texts used to describe institutional repositories reflects differing views on the importance of OA in terms of cultural ideas about information control, access to information, and social capital.

To pursue these questions, I choose textual analysis as a methodology. McKee (2003) defines textual analysis thus:

Textual analysis is a way for researchers to gather information about how other human beings make sense of the world. It is a methodology – a data-gathering process – for those researchers who want to understand the ways in which members of various cultures and subcultures make sense of who they are, and of how they fit into the world in which they live....We interpret text...in order to try and obtain a sense of the ways in which, in particular cultures at particular times, people make sense of the world around them. And, importantly, by seeing the variety of ways in which it is possible to interpret reality, we also understand our own cultures better because we can start to see the limitations and advantages of our own sense-making practices. (p. 2)

In addition to this, it is important to remember that text, rhetoric and discourse are by no means neutral. While the term “rhetoric” generally indicates an intention by the author or speaker to convince or persuade the audience toward a particular point of view, the terms “discourse” and “text” can appear, at first glance, more neutral and less prescriptive. This assumption of neutrality, however, can be misleading. Drawing on Foucault’s (1972) descriptions of discourse, Herb (2010) succinctly explains:

A discourse formulates specific rules which determine a view of reality via language. These rules define a specific context, a field of knowledge, a scientific field or even an abstract notion or idea (e.g., globalization). Discourse is tightly linked to power. It pretends to describe reality, but in fact, it prescribes reality. (Digital divide and information poverty section, para. 4)

While it is possible to conduct surveys, interviews and focus-groups to try to get at what people believe or how they feel about various issues (such as OA), a researcher can often get a clearer picture of the dynamics at work by examining the actual actions or artifacts being executed or created around those same issues. Depending on the circumstances, human beings often have a tendency to be naturally conciliatory or combative when asked their opinions on certain matters but their actions and the marks they leave behind often tell a different story.

## Method

To conduct this textual analysis, I choose to examine a sample of 46 websites of OA institutional repositories in Africa and the United States. The repository websites were examined in November and December 2012. I selected the institutional repositories from those listed in the *Directory of Open Access Repositories (OpenDOAR)* (University of Nottingham, 2006-11). I attempted to include all institutional repositories from Africa except when there was more than three in one country. I choose to limit my sample to no more than three from each country so that South Africa (with 23 institutional repositories listed) would not be over-represented. When there were more than three repositories listed, the chosen repositories were randomly selected based on their location in the *OpenDOAR* list. I choose not to include repositories housed in American or British Universities in the African countries. This resulted in 30 institutional repositories. Seven of the repositories originally selected (from Egypt, Ghana, Namibia, Zimbabwe and Cape Verde) had to be eliminated either because of access problems (the server was not available or the link was not working) or my own language limitations (for example, I had to eliminate those in Portuguese or Arabic because I do not read those languages). Institutional repositories that were in

French or English were included. This resulted in a total sample of 23 institutional repositories from the following Sub-Saharan African countries: Botswana, Cameroon, Ethiopia, Ghana, Kenya, Namibia, Nigeria, Senegal, South Africa, Sudan, Tanzania, Tunisia, Uganda and Zimbabwe. Although I did not originally intend to limit to repositories in Sub-Saharan African countries, my language limitations resulted in this more geographically specific sample.

To choose the American institutions and repositories I also used the *OpenDOAR* list of OA repositories. The repositories were randomly selected according to their placement on the *OpenDOAR* list. I chose not to select repositories that also included digital collections in their platform (i.e. digital objects housed or created at the institution that are not scholarly literature). Similarly, I chose not to include repositories that were limited to theses and dissertations. I chose to only include one institutional repository from each U.S. state so that some states would not be over-represented. The repositories were randomly selected from those repositories housed in colleges or universities. I choose not to include repositories housed in research centers or organizations. Although I did not intentionally set out to have equal representation of institutions from the U.S. regions, the resulting random sample of 23 institutional repositories does give substantial representation to each region. The repositories include those from the following U.S. states: Alabama, Arizona, California, Colorado, Florida, Georgia, Idaho, Illinois, Indiana, Iowa, Kansas, Massachusetts, Michigan, New Jersey, New York, North Carolina, Oregon, Pennsylvania, Rhode Island, Utah, Virginia, Washington, DC and Wisconsin.

After selecting the institutional repositories I examined each site for evidence of rhetoric in seven areas: General, Individualistic Perspective, Societal Perspective (Economic), Societal Perspective (Scholarly), Global Perspective, National

Perspective and Local Community/Institution Perspective. I also gathered data on whether or not the sites were engaged in social networking and noted which software they were using to host their repository. The specific criteria used to evaluate each of the seven areas are delineated in the table below.

Table 1: Textual Elements for Analysis by Category	
Category	Textual Element(s)
<b>General</b>	Provides explanation of the IR
	Explains the IR's history in the institution
<b>Individualistic Perspective — Benefits, Incentives and Protection</b>	Explains the IR's privacy policy
	Mentions higher visibility (including higher rates of citation or impact)
	Cites benefit of establishing intellectual priority sooner (by posting earlier)
	Cites persistent and durable storage and access to work /archival access as motivation for participating
<b>Societal Perspective —Economic Benefits</b>	Discusses prohibitory costs of traditional scholarly publishing methods
	Relates IRs with economic benefits in some way
<b>Societal Perspective —Scholarly</b>	Relates OA explicitly to the social benefit (for own community) of access to research
<b>Global Perspective —OA Benefits and Scholarly Communication Issues</b>	Mentions OA movement explicitly
	Explains or connects to a site that discusses Scholarly Communication issues more broadly
	Provides a link or indicates it is a signatory to the Compact for OA Publishing Equity (COPE)
	Makes connections to benefits to global community through free exchange of scholarly info
	Makes connections to benefits with global community through reduced costs to scholarship
	Provides links to other OA Institutional Repositories
<b>National Perspective</b>	Highlights the visibility of scholars from that particular country (as opposed to institution) as a goal of the IR
<b>Local Community/Institutional Perspective</b>	Mentions importance of advertising the scholarship of the institution at a whole as a goal of the IR
	Highlights "featured works" within the repository
	Uses the word "community" for their sub-collections
<b>Social Networking</b>	-Employes social network tools such as FaceBook and Twitter in connection with the IR pages.
<b>Type of Software</b>	Dspace
	Digital Commons/BePress
	CGSpace
	IR+
	GNU EPrints
	Eprints3
	Unable to Discern

After each institutional repository was examined for the above elements, descriptive statistics were gathered for the African and U.S. institutional results collectively so that they could be compared.

## Results

While I will summarize briefly the findings of the study here, detailed comparative results are presented in Table 2. The U.S. sites took a more individualistic perspective and were more likely to emphasize the personal benefits of contributing to the IR than the African sites. When analyzed from the societal perspective, the rhetoric revealed that the African institutions stressed the prohibitory costs of publishing or related IRs to economic benefits in some way more than the U.S. sites did. With relation to a more global perspective and the OA movement, The U.S. institutions were much more likely to mention and make an explicit connection to the OA movement; however, both groups had similar rates of explaining scholarly communication issues or linking to sites that explained the issues (U.S. 30%; Africa 22%). The African institutions were much more likely to provide links to other OA institutional repositories (U.S. 0%; Africa 22%). The African institutions were also more likely to make the connection between OA IRs and the global community through reduced cost to scholarship (U.S. 4%; Africa 17%) and/or through the free exchange of scholarly ideas (U.S. 26%; Africa 35%). Only one U.S. institution, Harvard, provided a link or indicated it is a signatory to the Compact for OA Publishing Equity (COPE). In terms of a nationalist perspective, only one African institution, the University of Khartoum in Sudan, highlighted the importance of the IR in terms of advertising the scholarly work of their nation.

From the view of a local community/institutional perspective, the U.S. institutions were overwhelmingly more likely to stress the importance of advertising their own particular institution's scholarship as a major goal of the IR. Less than half as many African institutions used this rhetoric (U.S. 57%; Africa 22%). The U.S. institutions were also much more likely to highlight "featured works" within the collection (U.S. 43%; Africa 4%) and the African institutions were much more likely to use the word "community" for their sub-collections (U.S. 26%; 61%); however, this appears to have more to do with the structure of the software being used than it actually reflects any particular ideology or approach. The Dspace software (which features "communities") is overwhelmingly used by the African Institutions (U.S. 17%; Africa 57%) while the Digital Commons/BePress software (which highlights "featured works" by individuals) is overwhelmingly used by the American institutions (U.S. 43%; Africa 0%). Only two institutions in the U.S. (9% of the U.S. sample) were currently using social networking tools (Facebook and/or Twitter) to highlight their IR and connect with users, although many of the U.S. institutions had Facebook pages for their libraries in general that were not specific to the IR.

**Table 2: Comparative Results of U.S. and African I. R. Sites by Category**

Category	Textual Element(s)	U.S. sites – % of total sample containing element	African – % of total sample containing element	Difference
<b>General</b>	Provides explanation of the IR	87	74	13
	Explains the IR's history in the institution	9	13	4
<b>Individualistic Perspective – Benefits, Incentives and Protection</b>	Explains the IR's privacy policy			
		13	13	0
	Mentions higher visibility (including higher rates of citation or impact)	43	22	22
	Cites benefit of establishing intellectual priority sooner (by posting earlier)	9	0	9
	Cites persistent and durable storage and access to work /archival access as motivation for participating	52	26	26
<b>Societal Perspective – Economic Benefits</b>	Discusses prohibitory costs of traditional scholarly publishing methods	9	17	9
	Relates IRs with economic benefits in some way	9	17	9
<b>Societal Perspective – Scholarly</b>	Relates OA explicitly to the social benefit (for own community) of access to research	17	13	4
<b>Global Perspective – OA Benefits and Scholarly Communication Issues</b>	Mentions OA movement explicitly	30	9	22
	Explains or connects to a site that discusses Scholarly Communication issues more broadly	30	22	9
	Provides a link or indicates it is a signatory to the Compact for OA Publishing Equity (COPE)	4	0	4
	Makes connections to benefits to global community through free exchange of scholarly info	26	35	9
	Makes connections to benefits with global community through reduced costs to scholarship	4	17	13
	Provides links to other OA Institutional Repositories	0	22	22

## Discussion

Several surprising results emerged from the data. One of the most surprising was that a large percentage of the institutions gave no explanation of why the institutional repository is a positive or desirable service at all (U.S. 39%; Africa 52%) – they simply defined it and left it at that. Some institutions did not even explain what the repository was on their website. This could be interpreted in a number of different ways. It could possibly represent a lack of commitment to the IR by the institution; however, it could also indicate a belief that there is no need to advertise, explain or promote the IR. If the later is the case, it could represent an assumption that everyone will already know what an IR is and how it operates or, alternately, that it is not the job of the IR administrators to promote the service – simply to provide it.

The greatest differences between the U.S. and African sites occurred in the criteria related to the individualistic and institutional perspective. The U.S. institutions emphasized personal and institutional benefits to contributing to the IR much more so than their African counterparts. The African institutions were more likely to emphasize the economic aspects and the global perspective of the free flow of scholarly communication than to highlight these individualistic or institutional benefits.

So, what can this analysis of these texts tell us about the rhetoric of green road OA efforts in the U.S. and the African countries represented in the study? As McKee (2003) has eloquently stated:

Performing textual analysis, then, is an attempt to gather information about sense-making practices – not only in cultures radically different from our own, but also within our

own nations. It allows us to see how similar or different the sense-making practices that different people use can be. And it is also possible that this can allow us to better understand the sense-making cultures in which we ourselves live by seeing their limitations, and possible alternatives to them." (p. 14)

While there have been calls from African scholars and information workers for a more globally equitable information regime since the mid-Twentieth century (Poppeliers, 2010; Sturges & Neill, 1998) the modern OA movement is largely a creation of the industrialized nations of the Global North. So what can the results of this textual analysis tell us about the internationalization of the OA movement and its impact on local or national scholarly micro-cultures? How do the differences presented in the sample reflect differing views between institutions in the U.S. and African nations on the importance of OA in terms of cultural ideas about information control, access to information, and social capital? Is it possible, as Ulrich Herb (2010) has asked in his sociological examination of OA and scientific publishing:

If open access is conceptualised as a vehicle to reduce the digital divide, it also reinforces existing dependencies and asymmetric allocations of discursive, political and materialistic power. This implicitly raises the question whether open access, in our discussion about the digital divide, supports Western imperialism. (Digital divide and information poverty section, para. 6)

This question flies in the face of the optimistic and determined rhetoric of many OA proponents who have ardently claimed that OA can provide a more even playing field at the global level for the free exchange of science and scholarly communication. And yet, Herb presents a compelling argument. It is also sometimes impossible not to note that the proselytizing nature of OA proponents occasionally rings a

little too close to the rhetoric of the former European colonialists. Despite this, Herb (2010) does concede that:

Nevertheless, open access gives scientists from developing countries opportunities to make their own scientific information available free of charge and to distribute it globally. In this way, open access provides opportunities for scientists anywhere to become active partners in scientific discussions...open access nonetheless gives the scientists from these countries opportunities to switch more easily from roles of information consumers to roles of information producers. (Liberalising elements, para. 1)

Despite this concession, his final analysis remains bleak as he cites other reasons why "It seems very doubtful if open access will really liberate scientific communication" (Herb, 2010, Liberalising elements, para. 1).

The results of my textual analysis suggest that African institutions are more cognizant of, and vocal about, the economic benefits of OA. They also are more insistent on the global context of the flow of scholarly information and the benefits of the free exchange of scholarly publications than their U.S. counterparts though they may not mention the OA movement explicitly by name as U.S. institutions appears more comfortable doing. I would argue also that the African institutions see the green road of OA institutional repositories as an important method for sharing their scholarship with the world and thus becoming more active participants rather than mere consumers of OA scholarship. One possible explanation for this is that the African institutions have dealt more substantially and repeatedly with access barriers to scholarly products. This also could well reflect the fact that scholars from less-industrialized nations have been excluded from scientific discourse in a number of other ways (Herb, 2010) U.S. institutions are much more likely to emphasize the

personal or institutional benefits for contributing to OA repositories – primarily focusing on increased citations rates and guaranteed archival, permanent access. This seems to confirm Herb's (2010) question:

Is a free and disinterested exchange of information really the prevailing interest of scientists? Or should statements to that effect rather be seen as some kind of “lip service”? Might it not be a more accurate assumption that scientists in reality are acting selfishly, striving for an accumulation of scientific capital that has to be gained and defended in distribution struggles?” (Recapitulation section, para. 2)

I would argue that the results from the U.S. sample would support this claim. It appears OA proponents in the U.S. believe the key to promoting OA repositories for an American audience is through primarily appealing to academic's self-interest rather than to a sense of information equity in a more global context.

## **Limitations and Conclusion**

As with any research, there are limitations to this study which must be acknowledged. The U.S. is a *country* with distinct *regional* histories, economies and ethnic sub-cultures. In contrast, Africa is a *continent* with myriad and distinct *national* histories, economies, cultures and sub-cultures. Additionally, the sample size for this study was relatively small and, due to my own language limitations, I had to exclude IRs where the language of explanation was in Portuguese or Arabic. Further work should be done to compare a greater number of institutional repositories from other parts of the world to see what rhetorical patterns emerge and what they might tell us about the internationalization or homogenization of the OA movement globally and how different world regions are making sense of changes in scholarly communication in

general. Textual analysis can help do this. Understanding the ways that different communities in different parts of the world are interpreting and interacting with OA, be it via the green or gold roads, can give us real clues about the impact of OA and whether or not it is truly succeeding in freeing scholarship from the bonds that have contained it in the past. If OA is not succeeding in that goal, members of the OA community, whether they are located in North America, Europe, Africa, or any other part of the world, will need to look closely at current strategies and assumptions that perhaps need re-evaluation and re-negotiation.

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# **CRITICAL INFORMATION LITERACY AND THE TECHNOLOGY OF CONTROL: THE CASE OF ARMENIA**

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## ABSTRACT

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As direct providers of information literacy, librarians can help patrons analyze the social and economic forces involved in the creation and use of information. This chapter will discuss why critical information literacy and critical pedagogy are especially important in the Armenian context, with its unique historical, cultural, and geopolitical concerns. The authors will document how the Armenian government has used cutting-edge Internet controls to block online content or misdirect users. We will also examine how Armenians perceive the independence of their available media and explore current efforts by telecom, publishing, and governmental concerns to restrict Internet freedom. The authors suggest ways for users to regain control over restricted media and argue that an open online culture cannot exist without local self-determination and a basic human right to produce and share information.

**Keywords:** Information literacy, intellectual property, social control, Armenian libraries, open access, liberal education, Internet freedom, censorship, privacy, democracy, new media, critical thinking

# **CRITICAL INFORMATION LITERACY AND THE TECHNOLOGY OF CONTROL: THE CASE OF ARMENIA**

Letting a maximum number of views be heard regularly is not just a nice philosophical notion. It is the best way any society has yet discovered to detect maladjustments quickly, to correct injustices, and to discover new ways to meet our continuing stream of novel problems that rise in a changing environment.

—Benjamin Bagdikian<sup>i</sup>

## **Introduction**

As direct providers of information literacy in higher education, librarians play a foundational role in fostering critical thinking skills in students. On a daily basis librarians help university students locate, use and cite information resources, but information literacy can also extend to helping students analyze the social and economic forces involved in the creation and use of information. Successful information literacy should effect some change in a student's worldview; as the ACRL states in Standard 3 of the *Information Literacy Competency Standards for Higher Education*, the information literate student not only evaluates information but also "incorporates selected information into his or her knowledge base or value system" (ACRL, 2000). When their work enables a student to reflect on or even modify his or her value system in this manner, librarians are practicing critical information literacy. Critical information literacy applies the principles of critical pedagogy, an approach that explicitly acknowledges "the power relationships inherent in any educational setting" (Donabedian & Carey 2011a, p. 205). If we accept that this

process also prepares students for civic participation in an open society—one of the traditional goals of liberal education—then critical information literacy becomes even more crucial for strengthening democracy in developing and transition countries. More than twenty years after emergence from Soviet rule, librarians in Armenia recognize the need for information literacy although its implementation remains nascent. This chapter will discuss why critical information literacy and critical pedagogy in higher education are especially important in the Armenian context, with its unique historical, cultural, and geopolitical concerns.

As Armenian librarians teach their patrons to access and evaluate a wider range of resources than ever before, the Armenian government has employed increasingly sophisticated means of controlling or denying access to online information. We will document how the Armenian government has used cutting-edge Internet controls to filter online content or misdirect users and will discuss global trends toward legislation that would limit a free and open Internet and raise intellectual property (IP) concerns for Armenia; by contrast, we will suggest ways in which librarians can contribute to the decentralization of and continued access to information resources. Finally, the authors will examine the strong connection between open information flows and the public discourse necessary for democratic participation. Helping university students develop the skills to exercise critical agency will be fundamental to continued democratic progress in Armenia.

## **Higher Education and Democracy in Armenia**

Along with other nations in the South Caucasus, Armenia achieved political independence in 1991 upon the dissolution

of the Soviet Union. After more than 70 years of authoritarian rule, Armenia and its neighbors began strengthening or developing the institutions necessary for a free and open society. Certainly, an informed citizenry capable of civic participation constitutes one such institution. The critical thinking skills that can be gained from higher education are crucial to developing such an informed citizenry. In fact, Paolo Friere, a founding figure of critical pedagogy, considered critical thinking to be a tool for civic engagement. For Friere, the increased self-awareness and agency achieved through critical pedagogy can “enable students to expand the possibilities of what it means to be critical citizens, while expanding and deepening their participation in the promise of a substantive democracy” (Giroux, 2010). Such an approach was not encouraged during the Soviet years. The Soviet model of higher education regarded knowledge as a received “truth” to be transferred straightforwardly from a professor “expert” to unquestioning students (Baker & Thompson, 2010, p. 59). Moving beyond this legacy has been one of the challenges of independence for librarians and other educators in the region.

Another challenge has been resource deprivation. Higher education faces fundamental fiscal challenges in post-Soviet Armenia, where major research libraries can survive but not expand. The Soviet Union made a priority of funding libraries in its territories as part of “a mission of spreading socialist ideas to the masses” (Usova, 2009, p. 246). Following independence, however, academic and research libraries in Armenia lost this centralized support, with some receiving no budget for new acquisitions of books, journals or databases for as much as 15 years (Dowling, 2005, p. 25). In addition to these budgetary constraints, librarians in Armenia and other South Caucasus countries also face political pressures. For several former Soviet republics, independence brought with it the outbreak of hostilities with neighboring countries, including the ongoing conflict between Armenia and

Azerbaijan regarding the territory of Nagorno-Karabakh. These geopolitical conflicts often have an impact on the information sources that residents can access, as governments seek to filter online content for political and military purposes. At the most basic level, this filtering may consist of firewalls at Internet choke points; at more sophisticated levels, it can range from legal instruments such as slander or defamation laws to technological capabilities that allow actors to control targeted content at sensitive times (Donabedian and Carey, 2011a, pp. 212-13). Despite the intermittent use of such filtering techniques, the online environment in post-Soviet Armenia has come to offer a range of divergent views through forums such as blogs or Internet news and radio sites.

In Armenia as in other former Soviet republics, librarians play a crucial role in helping students access and evaluate these sources, especially in societies where such freedom of expression had not previously existed. In fact, some have argued that information literacy is so central to free expression that it should be recognized as a human right. Sturges and Gastinger (2010) take as a starting point Article 19 of the United Nations' Universal Declaration of Human Rights, which interprets freedom of expression to include the right to "seek, receive and impart information and ideas, through any media and regardless of frontiers" (The Universal Declaration of Human Rights 1948, as cited in Sturges & Gastinger, 2010, p. 195). This endorsement of the work that information professionals do provided the basis for later resolutions such as the Prague Declaration of 2003, which identifies a basic human right to lifelong learning; and the Alexandria Proclamation of 2005, which connects information literacy to development and prosperity (Sturges & Gastinger, 2010). It would be helpful for librarians to bear this connection in mind when advocating for greater resources to be dedicated to information literacy.

While Armenian librarians are well aware of the importance of information literacy it is not, with notable exceptions, a part of university library instruction; research skills are usually taught by subject PhDs and not librarians. Moreover, although Armenian library education leads to the MLIS degree and follows a Western curriculum, a professional degree is not required for employment. Gaining professional status is a major obstacle Armenian librarians face as they work to strengthen information literacy instruction in colleges and universities. (See Donabedian, Carey & Balayan, 2012 for a discussion of Armenia's MLIS degree program, introduced in 2009.) However, at the American University of Armenia (AUA) and the Republican Scientific-Medical Library (RSML) we see the beginnings of a librarian-centered approach that continues to evolve. In a survey of five of the most prominent Armenian research libraries conducted by Donabedian, Carey & Balayan in the fall of 2011, responses indicated that only the above-named libraries explicitly require librarians to perform instruction (Donabedian, Carey & Balayan, 2012, p. 13). The Papazian Library at the AUA offers orientation sessions and workshops on using databases; the RSML, while not itself a medical school or university library, offers instruction sessions for residency students in cooperation with a nearby medical school as well as seminars and distance lectures for working doctors (Donabedian, Carey & Balayan, 2012). In addition to teaching these skills, the directors of both libraries endorse the need for expanded instruction in critical information literacy. In follow-up communications after the 2011 survey, the directors expressed agreement that information literacy skills can help patrons identify biased information and make better-informed decisions. Satenik Avakian, the director of the Papazian Library, commented that such skills are important for "building a powerful and knowledgeable community" (S. Avakian, personal communication, September 27, 2012). Anna Shirinyan, the director of the RSML, stated that information literacy and critical thinking skills are especially important in

the Armenian context “because we need to have [a] more informed … society, which will be able to be integrated in the global information and democratic infrastructures” (A. Shirinyan, personal communication, October 9, 2012). For all these reasons, increased instruction in critical information literacy must constitute a major goal for libraries in Armenia.

## **Setting the Context: Local Circumstances and Information Literacy**

There are many circumstances specific to Armenia that affect the scope and quality of information resources available to university students, faculty, and other researchers. Goods and services are accessible to relatively few and “widespread poverty and unemployment remain high” (Diebert et al., as cited in Donabedian & Carey, 2011a, p. 214). Moreover, Armenia has been at war for more than 20 years with neighboring Azerbaijan “over the border region of Nagorno-Karabakh. In 1994, a Russian-brokered ceasefire brought the possibility of lasting peace, but the two nations until now have been unable to resolve their differences” (Donabedian & Carey, 2011a, p. 214). Armenia’s uncertain geopolitical situation has no doubt had an impact on its governmental role in cyber space. Armenian students arrive at university having grown up in an environment that features broad Internet use as well as selective, situation-based filtering of the Internet, particularly with regard to political content. For Armenia as with other governments in the South Caucasus, the “need for internal order and control is at a premium.... Not surprisingly, many in government view the Internet and other telecommunications through the lens of national security, so that ‘these countries have increasingly turned to security-based arguments—such as the need to secure ‘national informational space’—to justify

regulation of the sector. Consequently, the region is a leader in the development of next-generation information controls” (Diebert et al., as cited in Donabedian & Carey, 2011a, p. 219). The Armenian government employs various “upstream” filtering schemes “including pressures put on Internet service providers, legislative controls, and the pervasive use of surveillance” (Donabedian & Carey, 2011a, p. 214). In assessing online freedom, the Open Net Initiative considers the degree of “transparency” in a given Internet environment, defined as “a qualitative measure based on the level at which...[a]...country openly engages in filtering.” When “filtering takes place without open acknowledgement, or ... is actively disguised to appear as network errors, the transparency score is low” (as cited in Donabedian & Carey, 2011a, p. 213). Because of substantial filtering, ONI assigned a “low” transparency rating to Armenia in their global assessment of Internet filtering (Diebert et al., p.137). It should be noted that the ONI determined this rating in 2008, when a government-declared state of emergency shut the Internet down for 20 days. Freedom of the press has improved to its pre-2008 level (Reporters without Borders, 2012, p. 4) and this is a hopeful sign.

Proponents of Internet restrictions often couch their initiatives “in business-friendly rhetoric about protecting intellectual property,” as a national security issue, or as attempts to “protect children;” while there is a place for such concerns, especially in terms of Armenia’s national security, some critics worry about the use of such legislation as a pretext to extend control over “the free spread of ideas amongst a public that is allowed to choose for themselves what information to believe and what to discard” (<http://www.corbettreport.com/beyond-sopa-the-past-present-and-future-of-internet-HYPERLINK> “<http://www.corbettreport.com/beyond-sopa-the-past-present-and-future-of-internet-censorship/>”). As a case in point, when Russia recently passed and implemented an

Internet censorship bill, it cited the need to stop child pornography from being disseminated. Internet freedom advocates are concerned, however, that the bill's implementation will be more wide ranging, as has been reported in the Russian media (<http://www.themoscowtimes.com/news/article/internet-censorship-faces-obstacles/471430.html>). As Russian is the second language of Armenia and Armenians are dependent on Russian sources for their information, the new bill is already impacting Armenian cyberspace. Furthermore, the possibility remains that this bill may set a precedent for the Armenian government to adopt similar legislation ([http://www.armenianow.com/economy/it\\_and\\_telecom/39368/internet\\_control\\_russia\\_censorship\\_armenia\\_saghyan](http://www.armenianow.com/economy/it_and_telecom/39368/internet_control_russia_censorship_armenia_saghyan)).

Currently, Russia is extending its efforts to censor Internet traffic in its support of giving the UN control over Internet Protocol-based networks. This was at issue during the December 2012 meeting of the World Conference on International Communications (WCIT), convened by the UN organization the International Telecommunications Union (ITU). Proposals from Russia and several other nations "would authorize member nations... to inspect and censor incoming and outgoing Internet traffic on the premise of monitoring criminal behavior, filtering spam, or protecting national security" ([http://news.cnet.com/8301-13578\\_3-57551442-38/russia-demands-broad-un-role-in-net-governance-leak-reveals/](http://news.cnet.com/8301-13578_3-57551442-38/russia-demands-broad-un-role-in-net-governance-leak-reveals/)).<sup>ii</sup> While the reported language of the Russian proposal would grant member states "the sovereign right to manage the Internet within their national territory" it transfers most Internet governance away from non-profit organizations such as ICANN (as cited in [http://news.cnet.com/8301-13578\\_3-57551442-38/russia-demands-broad-un-role-in-net-governance-leak-reveals/](http://news.cnet.com/8301-13578_3-57551442-38/russia-demands-broad-un-role-in-net-governance-leak-reveals/)). If adopted, these measures would threaten the relative liberty of not only Armenian cyberspace but Internet freedoms throughout the world.<sup>iii</sup>

Russia continues to exert its influence on Armenian cyberspace and, because of the two countries' cultural, historical and military ties, is likely to do so for the foreseeable future. Librarians must take this into account when practicing critical information literacy. In a recent interview, Henry Giroux offers some helpful guidance in this regard: "[W]hat has to be acknowledged is that critical pedagogy is not about an *a priori* method that simply can be applied regardless of context. It is the outcome of particular struggles and is always related to the specificity of particular contexts, students, communities, available resources, the histories that students bring with them to the classroom, and the diverse experiences and identities they inhabit" (Barroso Tristan, 2013). Thus, it makes sense for librarians to make Armenian students aware of the historical, social, and political forces that shape their contemporary information landscape. While Armenian post-secondary students and researchers face censorship and Internet filtering from their national government, they face further threats to online freedom from a number of transnational legislative proposals. Thus far these efforts have failed to transform law governing the internet due to concerted public resistance.<sup>iv</sup> Currently however, the Trans Pacific Partnership Agreement is under negotiation and, according to the Electronic Frontier Foundation, threatens to "extend restrictive intellectual property (IP) laws across the globe and rewrite international rules on its enforcement" (<https://www.eff.org/issues/tpp>). If successful, proposed global changes to IP law would raise access issues locally for Armenian research libraries in the networked global environment. Successful information literacy addressing both local and global contexts will enable students to apply a critical consciousness to the information resources they encounter.

## Recommendations

While an open Internet is a contested and subjectively understood goal, with many stakeholders including national governments, businesses, and citizens of all countries, the case of Armenia demonstrates the importance of free exchange of ideas in creating a democratic society. To support the growth of such a free online discourse, we suggest that university librarians in Armenia look to the following areas of engagement:

- **Open Access.** Armenia currently publishes five open access scholarly journals—mostly in the sciences—and the National Academy of Sciences maintains an online Fundamental Scientific Library (Donabedian & Carey, 2011, p. 208). Also in 2011, staff from the State Linguistic University were reportedly hoping to implement an institutional repository there (Donabedian & Carey, 2011, p. 208). However, Armenian librarians involved in these efforts acknowledge that awareness of OA publishing among faculty remains low. In addition to increased outreach to local researchers, we would also encourage librarians to consider the “Recommendations for the Next 10 Years” recently issued by the Budapest Open Access Initiative. The BOAI recommendations address the areas of policy, licensing, infrastructure, and advocacy (<http://www.opensocietyfoundations.org/openaccess/boai-10-recommendations>). Libraries can continue to work closely with organizations such as the non-profit Electronic Information for Libraries (EIFL) in pursuit of these goals.
- **Public access to taxpayer-funded research.** As part of an open access program, the Armenian government could also mandate open access to articles stemming from publicly funded research, following for instance

the example of the U.S. National Institutes of Health. Maximizing the dissemination and use of scientific research also maximizes its benefit to both the public and other researchers. As the authors have argued before, to strengthen and enrich its local research culture Armenia could consider enacting similar legislation (Donabedian, Carey & Balayan, 2012).

- **Free and open source software.** As EIFL has reported, the Armenian Fundamental Scientific Library of the National Academy of Sciences has been using free and open source software (FOSS) since 2006 as an alternative to the high cost of proprietary software and its attendant fees (Donabedian & Carey, 2011a, p. 204). Given the severe economic challenges Armenia faces as a transition country, this has been very beneficial. Furthermore, FOSS empowers local researchers and helps to decentralize the conditions under which information is created and used.
- **Be Your Own Media.** Despite the rising costs of access to licensed resources, communications technology enables local media production now as never before. Commentators within Armenia are already using such forums as blogs, podcasts, and social media for political, educational, and cultural purposes. More sophisticated platforms are also becoming available for scholarly communications, such as the Open Journal System (OJS). Employing the principles of FOSS, the Public Knowledge Project (a consortium of North American universities and library groups) has made OJS “freely available to journals worldwide for the purpose of making open access publishing a viable option” (<http://pkp.sfu.ca/?q=ojs>). Installed and controlled locally, OJS takes a manuscript through every stage of the production process, including electronic submission, peer review, copyediting, and online publication. These and no

doubt other platforms to come can help researchers in Armenia gain local control over the production, expression, and dissemination of views and scholarly output.

## **Final Thoughts: Reframing the Issues**

Armenian librarians and students of higher education find themselves facing several information challenges in the changing landscape. The war with Azerbaijan is intensifying with renewed border skirmishes and ceasefire violations (Radio Free Europe/Radio Liberty, 2013). Moreover, fueled by oil wealth, “Azerbaijan’s spending on defense in 2011 exceeded Armenia’s entire national budget” (German, Eberhardt, & Sammut, 2012). Given this tension, and Armenia’s long history as a war theater, it is likely that the country’s security concerns will continue to influence its political filtering. For a democratic Armenia, the challenge will be to secure its cyberspace while it also safeguards the free flow of information for its citizens. Armenia is also vulnerable to growing censorship in Russian cyberspace on which it is in large part dependent. Furthermore, a continuing stream of global legislative proposals seriously threatens to restrict IP laws in Armenia. Because of cost concerns, these could limit access to information for university and research libraries in the country’s challenged post-soviet economy.

Various interests continue to vie with public proponents of an open and free online culture. The future, however, of Internet freedom for Armenian researchers will be determined not solely through the influence of these forces but—more importantly—locally by a democratic vision of information sharing, community building and citizen empowerment. As Ms. Avakian’s earlier comment brings out, librarians have an

important role to play in teaching the critical thinking skills necessary to build vital and informed communities. In this regard, the Internet constitutes “an especially powerful tool when users network with each other not only online but also face-to-face, in the street. The infrastructure of the net ‘after all, simply amounts to the latest kind of community infrastructure, one that ... allows all people to be productive and prosperous, not merely those who already have achieved that condition. In today’s world ... broadband is a necessity, one that has fueled economic development, transformed communications, fostered free speech, unlocked new services and innovations, and engaged millions of people in civic participation’” (Huff & Philips, as cited in Donabedian & Carey, 2011b, p. 9). The critical tools Armenian research librarians can successfully employ to educate an informed citizenry include identifying diverse resources and points of view, verifying sources and evaluating bias. Librarians can facilitate this process and empower students to challenge efforts to impede it.

Selective political filtering aside, Armenia at present has a relatively open Internet and a growing open access movement. This demonstrates Armenia’s support for content sharing and access to a diverse range of sources as well as the increasing power of students, researchers and librarians, backed by constitutional guarantees,<sup>v</sup> to shape the development and scope of Armenian information resources. Cybernetics founder Norbert Wiener speaks to this when he states that “[t]o live effectively is to live with adequate information” (Wiener, p. 18). Here we define “adequate” information as quantitative or qualitative, both credible and sufficient. Information’s control and use “belong to the essence of man’s inner life” (Wiener, p.18), reinforcing the idea of information literacy as a human right. When unfettered by special interests, this inner life expresses itself interactively through the new media and the community-at-large extending globally.

Concurrent with action on the local level, we also see the need to reframe the arguments used to justify attempts to regulate the Internet globally. Rather than defining “justice” in terms of business interests or law enforcement, let us instead interpret the notion more broadly to include a rights-based argument for information justice. We submit that information, in order to serve the needs of society, must be safe-guarded from proprietary interests or monopolies.<sup>vi</sup> Indeed, if adequate information is necessary for informed democratic functioning, then democracy itself comes under threat when the public loses access. Therefore, preventing the usurpation of the public commons by commercial or political interests requires that we remain watchful and provide viable alternatives. The 2012 Declaration of Internet Freedom, published by the Free Press/Free Press Action Fund (<http://www.internetdeclaration.org/freedom>), identifies 5 interdependent principles—privacy, free expression, openness, access, and innovation—that, privacy excepted, are all potentiated by the commons and would not exist in any robust sense without it. Moreover, they embody the principles through which diverse information can be sourced. Contrary to the content industries which have “an interest in creating artificial scarcity by whatever legal and technological means they have at their disposal.... citizens and consumers have an interest in abundant information. To be democratically, artistically, and scientifically useful, information must be cheap, bountiful, and accessible” (Vaidhyanathan, 2004, p. 125). As the volume of publically shared information increases, librarians are needed more than ever to provide university students the necessary tools to weigh and evaluate information and its sources. As information literacy in Armenian higher education grows, librarians could work to instill critical thinking skills, encourage civic participation, and uphold the principles of internet freedom the Declaration sets forth. Indeed, history shows us that lasting change often comes through a critically conscious and empowered minority. For Armenian college and university

students, the ability to critically evaluate information will shape their success or failure when exercising individual and collective power. As Buckminster Fuller said, “You never change things by fighting the existing reality.” Instead, he urged, “build a new model that makes the existing model obsolete” (<http://www.bfi.org/dymaxionforum/makingtheworldwork>). It is toward this end that we encourage Armenian librarians and other educators to direct their efforts.

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(Original work published 1954)

## Footnotes

- i. See Cirino, p. 32.
- ii. On the subject of national security, the UN has issued a 2012 report entitled “The Use of the Internet for Terrorist Purposes.” The stated purpose of the report is to provide “guidance regarding current legal frameworks and practice at the national and international levels relating to the criminalization, investigation, and prosecution of terrorist cases involving the Internet” ([http://www.unodc.org/documents/frontpage/Use\\_of\\_Internet\\_for\\_Terrorist\\_Purposes.pdf](http://www.unodc.org/documents/frontpage/Use_of_Internet_for_Terrorist_Purposes.pdf)), p. v.
- iii. As of December 5, 2012, the Center for Democracy and Technology (CDT) reports that the ITU at the WCIT has decided to work toward the censoring of Internet traffic using deep-packet inspection or DPI. According to the CDT, the potential global impact of this decision on privacy, online trust and users’ rights is a major concern ([www.cdt.org/print/19957](http://www.cdt.org/print/19957)).
- iv. These unsuccessful proposals include the Stop Online Piracy Act, the Protect IP Act, The Anti-Counterfeiting Trade Agreement, and the Cyber Security Act.
- v. According to the ONI, “[w]ith regard to media rights, the Armenian government constitution guarantees freedom of expression, media, and other means of mass information....” (Diebert et al., p. 142).
- vi. See N. Stephen Kinsella’s body of work for an examination of the disadvantages of IP, including his book *Against Intellectual Property* (<http://mises.org/books/against.pdf>).

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**A COLLEGE LIBRARY IN  
AFRICAN CULTURE:  
A CASE STUDY OF GLOBAL  
LIBRARIANSHIP  
IN KAMPALA, UGANDA**

**RACHEL I. WIGHTMAN, MLIS**

**REFERENCE AND INSTRUCTION  
LIBRARIAN AT NORMANDALE  
COMMUNITY COLLEGE IN  
BLOOMINGTON, MN.**

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## ABSTRACT

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Libraries are a fairly Western institution and in other, non-Western contexts librarians may struggle to create and maintain libraries in a culturally appropriate way. For example, in many areas of East Africa, culture is traditionally an 'oral culture'. That is to say, information is traditionally passed or learned orally, as opposed to through the print medium common in Western culture. This creates an interesting dilemma for librarians trying to create a 'traditional' library of books in these cultures. This chapter in particular looks at the author's first professional librarian position in Kampala, Uganda. When taking a 1.5 year position, the assignment was to 'computerize the library'. Computerizing a library involved more than installing computers but rather involved looking at larger, cultural questions. A librarian's goal is never to enter a new culture and simply say "This is what you need" without fully engaging in and understanding the cultural context. Instead, creativity and big-picture thinking are essential in building a culturally relevant and sustainable library.

**Keywords:** Uganda, Cataloging, Culture, Computers, Developing countries, Africa, Libraries, International, Academic libraries, East Africa, Librarian, Oral tradition, Education, Western influence

# **A COLLEGE LIBRARY IN AFRICAN CULTURE: A CASE STUDY OF GLOBAL LIBRARIANSHIP IN KAMPALA, UGANDA**

## **Section 1: Introduction to Global Librarianship**

What exactly does it mean to be a 'global librarian'? Does it mean working in a new country or with people from other cultures? Or does it mean being aware of global issues? This chapter looks at one example to explore possible answers to these, and other, questions. We will look at one example as a case study that provoked complicated questions about libraries and their cultural contexts. This case study looks at a college in Uganda and a project to computerize the library on campus. In the process of this project, becoming a global librarian meant moving to a new country, working with people from other countries, and being aware of cultural issues that might influence the library.

One way of becoming a global librarian overnight is choosing to live and work in another country. I chose this path for a number of reasons. With an academic background in intercultural studies, community development, and library science, I am particularly interested in how libraries impact their communities and vice versa. And after previously studying abroad in East Africa, I was interested in returning to Africa after completing my MLIS. I chose to become a Global Librarian by living in another culture and working at a library in Uganda. In the process, I learned that choosing to live in another culture is not always an easy decision but it is

incredibly rewarding. Depending on the host country, the culture, language, and way of life may be very different from a person's home country. There is often a steep learning curve for those wishing to live abroad, especially for those, like myself, who wish to fully engage and live in the local culture and community and not live in an exclusively expatriate community. I strove to learn about the local culture and build relationships. I also discovered that librarians choosing to work abroad may have additional questions to ask in their work. These include: what does a library look like in a culture other than my own? Can services exist in the same way or are changes necessary to allow for cultural differences? If so, what are those changes? How will services change with the resources available? These questions cannot be taken lightly in order for librarian's work to be successful in the host country.

To be effective, a global librarian choosing to live and work in a different culture must remember the purpose of libraries. At their core, libraries exist to serve their respective communities and to connect people to information. Libraries differ significantly and the best examples—in any cultural context—focus on best serving their users. Although most libraries share some similarities, no two user populations are exactly the same and librarians work to develop a library uniquely suited to each community.

Ranganathan's five laws of library science help serve as a basic foundation of why libraries exist and how they can best serve their user groups. For example, Ranganathan's (1931) Second Law states: "every person his or her book" (p. 75), which implies that a library's collection should be made up of books or materials that are best suited to the users' needs. This is a good reminder to the global librarian: the library's collection should be carefully tailored to the needs of the community and culture—not to the librarian's personal choices or home culture. This can present difficulties for cross-cultural

librarians who are asked to bring their skills and expertise to implement a specific program or technology. To meet the challenge successfully, a global librarian will start by understanding the needs and cultural environment of the community the library serves.

Trying to create a 'traditional' (e.g. Western) library in a non-Western context posed a particular problem in the Ugandan context where I worked. In my case, and in others, importing a Western model of librarianship may not be appropriate or successful in another culture. After moving to Uganda, I immersed myself into the culture, to better understand the type of information the library users sought. Taking a cue from Alemla (1995) I tried to learn what information seeking skills and behavior already existed within the culture and library: "...information skills of some applicable nature and level are needed by people from all communities and...in the case of what we call developing communities, some consideration should be given to circumstances which differ tremendously from those experienced in developed communities" (p.41). Taking the time to do this first step and to understand the information skills already in place, helped ensure the library would be culturally relevant. If a Western-style library is not the best fit, the librarian must determine the best ways to provide library services for that specific context.

## **Section 2: Reformed Theological College Library**

Reformed Theological College (RTC) is located outside Kampala, Uganda and was established in the mid-1990s by Korean missionaries. The college's motto is: 'Training students for spiritual reform'. The institution primarily trains church leaders from across Africa, providing education to those working in village, and often rural, churches. As of this

writing, the school offers programs in Theology, Music, English, and Early Childhood Education, with Theology being the largest component. There are approximately 80-100 students in any given semester. The college is diverse, with students from various African countries, including: Kenya, Uganda, South Sudan, Rwanda, Democratic Republic of Congo, Tanzania, and Burundi. Bachelor's degrees and Advanced Diplomas are offered in cooperation with North-West University (NWU) in South Africa. The curriculum is designed at NWU but taught at RTC by local professors.

The library is located in a small building on campus. It has one main room which houses the majority of the collection plus the reading/studying area [see Figure 1]. There is also a small office space, which serves as the reference and circulation desk, and a small storage room. The library has approximately 8,000-10,000 books, most of which were donated to the college through various organizations and individuals. There is a small reference collection of encyclopedias, dictionaries, and biblical commentaries. The library also contains a small collection of reserve books, which are kept behind the circulation/reference desk. The majority of materials are in the general collection, which contains a large variety of books, from Bible commentaries and theological works to self-help books and novels. Because books have typically come from donations, there are many books in the collection that are irrelevant to the curriculum.

Students generally use the library for studying and homework and, since the installation of computers, for computer access. Few students utilize library materials for pleasure reading. Instead, they focus on finding print materials to help them specifically in their studies. The most commonly requested books are from the Reserve Section. This core collection of books is heavily used, partly because there are simply not many relevant books in the library from which to choose. The library has some key texts in different subject areas, which

constitute the bulk of the circulating books. The library also houses the college's textbooks, which are lent out for one semester at a time.

Beginning in 2011, RTC administrators chose to start a project to 'computerize the library'. They wanted to move the library into the 21<sup>st</sup> century and to ultimately prepare for an upcoming national registration inspection by the Ugandan National Council of Higher Education. In order to do both, the project was two-fold: catalog the library's book collection and provide computer access to students in the library.

The project included: picking an Integrated Library System (ILS), installing computers for library staff and patrons, cataloging the collection, and teaching computer and research skills. This project was intended to move the library forward, as Raganathan's Fifth Law of librarianship states, "libraries are growing organisms" (Raganathan, 1931, p. 382). During the process, I asked a number of questions in order to ensure that the library's growth was culturally relevant and also in keeping with the laws of librarianship. [See the Appendix for an extensive list of questions considered.] I wanted the foundations and theory of librarianship to influence the project, not my own cultural understanding of librarianship.

Because a library's new innovations and services will only be successful if they fit within the culture, trying to recreate completely Western-style computer services was not the goal of this project. Ultimately, the goal of the RTC library and project was to connect students to information, particularly through technology. By choosing this goal, I focused on the fundamentals of librarianship, so as not to get overwhelmed by the details of installing computers, cataloging, and teaching. Remembering the libraries' purpose helped me as I began this project by focusing my attention on the bigger picture of library service.



**Figure 1: Inside the library at RTC (© 2011, Rachel Wightman, from personal collection)**

## **Section 3: RTC Library Computerization Project**

### **Preliminary Research**

Before moving to Uganda, I read books and emailed with RTC administrators to establish a basic understanding of Ugandan and East African culture, RTC, and the library. But after arriving, I wanted to specifically understand how the library was being used and which services were in place and effective. As an outsider to the culture and the college, this was an important first step. RTC staff, faculty, and students were all interviewed and observed in order to get the most accurate picture of the local culture and of current library and college policies. Using reference and research skills, I asked questions and

gathered necessary information. I wanted to see how Ranganathan's Five Laws and other library theories were or were not already in place. I had a number of practical librarian skills and experience—reference, instruction, cataloging, acquisitions—but I wanted to learn how those practical skills fit into a new culture and library. I needed to see the college, culture, and library in action. By gathering first-hand information about the local practices, I was able to combine that knowledge with my own practical librarian skills.

## Cataloging

After gathering information, an ILS was chosen and computers were installed over the course of several months. A number of online resources were consulted, including the AutoCat listserv and librarian blogs. I also looked at resources available from library associations, such as American Library Association (ALA) and American Theological Library Association (ATLA), to help inform my decision. For example, the ALA Fact Sheet 21 was a helpful tool, which included a "...selection of print and online resources that will provide an introduction to the issues to consider when selecting a tool that organizes yet provides patron access and circulation inventory..." (ALA, 2012). I also consulted with Ugandan librarians in order to find out what ILS's were being used in Uganda. It was important to me to not come to a new culture and library and simply bring my own ideas. Having never chosen an ILS before, I consulted other librarians and well-established organizations to learn from and take advantage of their expertise.

Ultimately, after researching many options, I chose a program called ResourceMate®. This program required a one-time purchase and download. Because internet access was not available at the beginning of the project, the ILS could not be web-based. I downloaded ResourceMate® to a flash drive in the main staff offices where internet was available and then

installed it on the library machines. Before moving to Uganda, I hoped to work with an open-source ILS but ultimately I chose the locally installed program for its simplicity and to best accommodate the lack of internet access. RTC hoped to provide internet access to the library at some point but there was no guarantee when that would happen. Additionally, internet access in Uganda was erratic at best. It was better to start cataloging on a locally hosted program rather than wait for internet that might never be consistent or available.

Cataloging began after the ILS was installed. The library staff, which included the librarian—myself—and one library assistant, first discussed the different classification schemes before we created cataloging workflow. We discussed the pros and cons of using Dewey Decimal Classification (DDC), Library of Congress, or a locally designed system. During our discussions we asked the following questions:

- What classification scheme do other Ugandan libraries use?
- What is easiest for students to understand, especially students who may have never been to a library before?
- What scheme are students most likely to encounter at other libraries if they choose to further their education?
- Which system will be the easiest for library staff to use in cataloging? That is, what resources for assigning call numbers are easily accessible to library staff?

This was one of my first experiences in thinking about how developing countries take specific library tools and adapt them to their needs. I quickly learned that adapting a library to a different culture requires asking a lot of questions.

After much consideration, we chose a modified/simplified version of DDC. We chose DDC partly because of the small size of the collection. And, after talking to a Ugandan librarian at Makerere University in Kampala, we learned that many

libraries in Uganda use DDC. Using DDC prepared RTC students for the future as well; if they chose to continue their studies there was a high probability they would encounter DDC again. Additionally, there was a hard copy of the DDC books already in the library. And, while the printed books were not the latest version of DDC, they would at least point the library staff toward a call number approximation. Without access to many cataloging tools available in the US (e.g. Cataloger's Desktop, Web Dewey, etc.) it was important to utilize the resources that were available.

Having agreed upon a classification scheme appropriate to the size and needs of the RTC library, we discovered another hurdle: no label printers or typewriters available to us. We had to be creative and research, again, what other libraries in the area used to label books. Ultimately, call numbers were handwritten onto labels [See Figure 2]. Global librarians choosing to work in a developing country will learn to be creative with the supplies available, asking themselves which supplies are actual *needs* and which supplies are simply what they used previously. Many supplies I used in the US were not available to me in Uganda and I learned that many of them are not actual necessities but simply a part of library service in the US. Global librarians might also find other ways to get materials. For example, at RTC some library supplies, such as book ends and label protectors, were donated by friends of the college in Korea [See Figure 3].

After choosing a classification system and figuring out how to label and process the books, cataloging began. In general, this involved removing several shelves of books at once and then cataloging, classifying, and labeling them. Before the project began books were loosely organized into categories in the general collection: one section for Biblical commentaries, one for fiction, one for church history, etc. After cataloging and classification, the books did not always go back on the shelves

in the same order. Logistically trying to remove hundreds of books, catalog them, and shelve them in a new order was extremely complicated. We used an empty shelf and table as a staging area and any shelved books were continually shifted to make room for newly cataloged books.

Signs were also made and posted, explaining DDC and encouraging students to browse the collection. Cataloging the collection radically changed the way students sought materials. Previously, students often found the books they wanted and repeatedly went to the same area over and over to find information. After cataloging, the library staff could easily look up the call number in the computer but students had to learn the new ways of looking for books. They learned that by using the DDC numbers they could browse the collection for a much more specific topic. For example, instead of scanning a large section for books on early church history, they could now ask the library staff for the DDC number and find all the materials pertaining to church history at once.

All books were cataloged with subject headings and customized DDC call numbers. Eventually, internet access was provided in the library, after which most records could be imported and copy cataloged. This increased the speed of the project significantly. It also improved the cataloging records by allowing internet access to research subject headings and call numbers. Ultimately during a year and a half, over 6,000 books were cataloged, approximately two-thirds of the collection.



**Figure 2: Hand-written and simplified DDC (©2011, Rachel Wightman, from personal collection)**



**Figure 3: Library staff with donated supplies: book ends and label protectors (©2011, Rachel Wightman, from personal collection)**

## **Computer Services and Access**

Again, it was important to remember the basic goal the library and project: connecting people to information, through technology when possible. However, early in the project, a major issue became apparent: the inconsistent supply of electricity and internet access. This is a common issue across much of the developing world. And especially an issue librarians in those countries face in order to provide computer and/or internet access. Because computers and internet access were not available regularly, I developed creative ways to provide services. My background in community development taught me to focus on what already exists in a community before moving forward. For example, in Uganda, go-to databases previously used in the US were not available. And the lack of electricity often prevented even basic use of computers for cataloging. Instead, we focused on the print resources on hand and learned to maximize use so that even if internet or electricity (or both!) were unavailable, information was still available to patrons. This meant regular shelf-reading of the collection, in order to know what types of materials were on the shelves and to be able to quickly find materials, cataloged or not. In other cases, the lack of electricity meant writing down research questions to be searched later, when computer and internet access were available again.

Additionally, introducing computers to students who previously had minimal access created a number of challenges. One of the first issues was how to let approximately 80-100 students share the 4-5 public computers in the most equitable and culturally sensitive way. It wasn't unusual to see three to five students huddled around one or two computers [See Figure 4]. One person was typing, another moving the mouse, a third directing the whole operation, and the fourth and fifth observing. Much of African culture is community based, where

activities are done together and “...[t]he individual and the group are...linked to each other by a thousand indissoluble ties...” (Sow, Balogun, Aguessy, Diagne, 1979, p. 94). In this collectivistic culture, how should or could the computers be shared? Was it better to let everyone work together or should time be allocated in equal parts for one student at a time? Which is better for the culture? Which is better in an academic setting? “...I have a choice: insist that only one person uses the computer during his or her given time slot. Or recognize that many of these students are used to doing tasks in community and let them share the time. Ultimately, as long as everyone is getting a turn and no one is ‘hogging’ the time, I don’t care...” (Wightman, 2011). This was an example of learning to understand the culture as it relates to a particular library issue.

Ultimately, a sign-up sheet system was devised, on a first-come first-serve basis. Students chose a time slot and signed up, if a computer was available. Group-work at the computers was allowed, if groups were quiet. Although this might seem to be an equitable decision, it still created interesting conversations. Before the sign-up sheet, students generally sorted themselves out with regards to taking turns, etc. But after time slots were chosen, conversations along the lines of, ‘Hey, it’s my turn’ were overheard. This was an ongoing issue throughout the year and a half project. The staff didn’t want to change the communal nature of African culture but also wanted to allow everyone the ability to get their work done. There was a fine line between balancing the local culture with the academic and research needs of the students.

In addition to sharing the computers, staff also considered how and when students could be taught to use the computers. Previously, many of the students had minimal exposure to computers. Some of them had email addresses and a few had personal laptops, but many students wanted to learn more advanced word processing, internet, and research skills. The

books and materials also needed cataloging, so time management became very important as the library staff was inundated with computer-related questions.

Often computer questions were in-depth, such as how to set up an email account or where to find information online. Setting up and explaining email to someone who has never used it can be a long process. It requires breaking steps into basic components and patiently explaining each step. For example, explanations included what a password is and why it should not be '12345678'. And, after online accounts were opened, a new set of questions arose from students: those relating to electronic vocabulary. Phrases and words such as: 'attachment', 'profile', 'compose', 'search engine', 'browser', and 'instant message' all took time to explain. A global librarian working in a non-Western setting may have to break down many potentially 'common sense' terms into very basic explanations. Things that are second nature to librarians and students in many parts of the world are new concepts to some in East Africa. I often tried to put myself in the students' shoes, remembering what it is like to learn new technology.

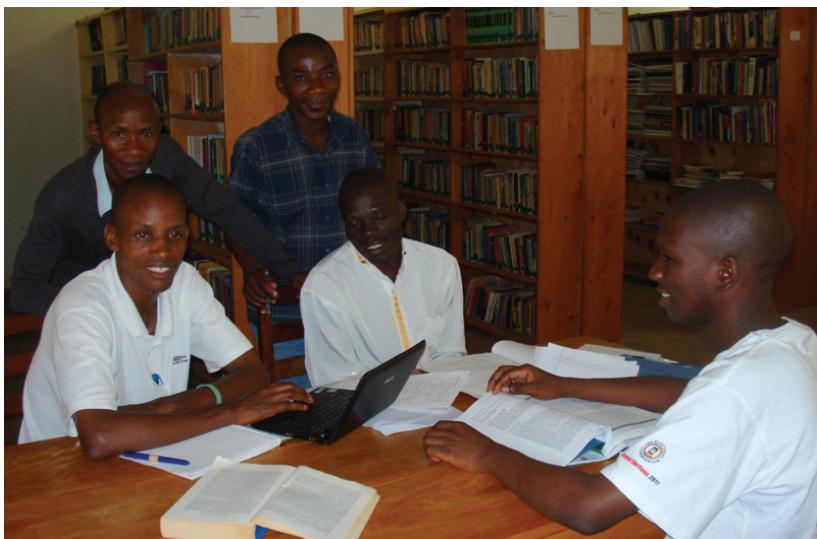
In order to address some of these questions more thoroughly and also leave time for cataloging, computer research workshops were taught. These were optional classes taught by the library staff and were designed to address as many questions by as many people as possible at once. The classes covered a number of topics, including email set-up, word processing with Microsoft Word, using Google and Wikipedia, and basic internet etiquette. As students learned skills in classes, they began to help and teach each other when the library staff were busy cataloging. This allowed students to learn necessary skills, continue working in community, and the library staff to move forward with cataloging the collection.

Additionally, introducing computers and internet into the library and students' lives opened a new world for many of them. They could now communicate with friends in or find information about other parts of the world. In one computer workshop, online map services. Students were delighted to see the bird's-eye-view of the RTC campus. Afterward several of them searched for their home towns and villages on the satellite maps. Sometimes they were successful. But in the case of one student, who had escaped as a child from an area torn apart by war and genocide, the satellite images were very different from the village he remembered from his childhood. It was a good reminder that while technology opens up new opportunities, it may also bring up painful reminders of the past. Introducing new concepts and technology were not taken lightly.



**Figure 4: Communal aspect of working on computers in Africa; RTC students (©2011, Rachel Wightman, from personal collection)**

Library staff also discussed the division of space extensively after computers were installed. With only one room, space was shared between students participating in group work [see Figure 5], quiet reading, and computer work. Librarians in the US are fortunate in the ways in which libraries are designed in the West: often a separate room is designed for group or computer work. A one-room library forced me to daily think about how best to utilize the space in order to meet the needs of the most patrons. Those talking or working together on computers often had to be told to be quiet and those studying often had to be reminded the library was a shared space. Ultimately, a one-room library required patience on the part of all parties involved.



**Figure 5: Sharing space; a group studies in the same room as the general collection and where others are studying individually**  
(©2011, Rachel Wightman, from personal collection)

## Culture

Throughout the year and half I lived in Uganda, the majority of my library-related questions were also cultural. To be truly global, whether working with patrons from different cultures or living in an entirely different culture, librarians must ask questions about the community and how to best serve the library's users. In this case, an American librarian, in a Ugandan library, and serving African students made for interesting conversations, mishaps, and adapted workflows.

For example, there are cultural differences on time. Traditionally many African cultures have viewed time as a series of events or activities, as opposed to the Western culture of dividing the time into hours and minutes (Booth, 1975). Some expatriates referred to this as 'African time', where events begin when everyone arrives but not necessarily at a given time on the clock. The different cultural views on time made for interesting situations when library instruction sessions were scheduled. A workshop might be scheduled at a particular time but students generally arrived within half an hour of the start time. Then there were two questions: Begin the class on time with only a few students? Or wait for everyone to arrive? I struggled with not wanting to force my culture on the students (i.e. insist they show up on time) but also wanting to respect the collegial setting (i.e. class timetables). Both were tried on different occasions with varying success.

The cultural view on time also influenced how students used the computers. After the sign-up sheet was in place, students were allowed to come and sign up for any time slot that day. However, because of 'African time' a student might sign up to use the computer at 2pm but not arrive to the library until 2:30pm. Again, cultural questions do not

have easy answers. This particular scenario sparked the following questions:

- Should a late student be allowed to use the computer?
- Should another student be allowed to use the time instead?
- How late is late? How many minutes should pass before another student can use the computer?

In this situation, which happened often, library staff tended to take it on a case-by-case basis. Depending on the circumstances, a student might still be allowed to use the computer or he might have forfeited his turn.

The varying views on time and culture required me to be flexible. Flexibility is important when working in or with another culture. At RTC class schedules often changed and/or library staff were asked to help teach a class at a moment's notice. Extra 'visitors', including chickens and bats, came into the library and had to be removed. In the middle of cataloging, students might have an in depth research question, the electricity might go out, or professors might bring in their class for an impromptu library instruction session. One never knew what a day or week would bring and it was important to keep an open mind and have a 'back-up plan' just in case.

Additionally, many students at RTC came from a traditionally oral culture, "...which has been used to transmit information and knowledge in Africa from generation to generation" (Nyana, 2009, p. 13). Their home cultures, like many in Sub-Saharan Africa, traditionally gather and relay information orally, as opposed to the print medium of the West. This oral tradition affected the ways in which students looked for and used information on campus. Because of this, they were generally allowed to do group-work in the library, not only at computers as mentioned earlier but also when doing

homework. The opportunity to talk together about assignments was part of their oral tradition and allowed students to continue to gather information in ways in which they were comfortable.

Students also often preferred to discuss homework questions together, using books only for information not taught in class. Students rarely read books for pleasure; books were not necessarily seen as a primary way of gathering information. Printed materials were tools for academic studies and used to find the answers for assignments. As far as the library staff could tell, few books were circulated for personal reading or for further education on a topic. The staff questioned how to encourage the students to read and utilize the collection more thoroughly. This is a common question in most libraries: how to increase circulation, but one that is particularly pertinent in a culture with oral tradition. At one point, I tried creating book displays to encourage students to look at books they might not otherwise see. This was minimally successful. I tried creating displays based on the time of year or on a specific subject. In both cases, students looked at the books on display and asked what the books were for. But the displays didn't seem to increase the circulation of those books.

All these issues were compounded with the fact that, for many RTC students, English was their second, third, or fourth language. One of Uganda's official languages is English and all classes at RTC were conducted in English. However because some students did not speak English fluently, library staff worked to explain library concepts in ways the students would understand. We were sensitive to the ideas proposed by Meredith (2005) with regards to working with international patrons: "The use of jargon, abbreviations, libraryese, and slang sayings should be avoided at all costs. Although we librarians do have our own jargon, we should try to be other oriented, and stop to listen how something might sound to the receiver on the other end" (p. 66). This was especially

important at RTC. And, along with eliminating jargon, I also tried to learn the local language. Although I did not achieve fluency in a year and half, it was helpful to know a few phrases of the local language in order to better explain concepts to students.

Finally, the most important cultural value to remember was the importance of community and relationships. In the library this meant greeting students as they entered and asking them about their days. Building relationships also meant learning students' names, what classes they were taking, and engaging them in conversation. The tasks involved with computerizing the library were important (e.g. installing computers and cataloging books) but ultimately it was more important to build relationships with students. Meredith also notes that when working with international patrons it is important "...for us to put ourselves in the user's shoes, to gain an understanding of the person on the other side of the desk" (Meredith, 2005, p. 1). By listening and learning the stories of RTC students, I was trying to say, "You are important. I care about who you are as a person. How can I help you find what you need for your classes?" Global librarianship means teaching others about libraries and how to use information resources; to do so effectively, librarians must first understand the patrons' culture and build relationships with them.

## **Section 4: Conclusion**

Nyana (2009) suggests that library initiatives in Sub-Saharan Africa should develop programs that meet the needs of Africans in order for those libraries to be effective. Librarians working in these areas must look to the cultures within which they exist in order to create and maintain effective libraries.

While Western librarianship may have concepts to offer libraries in developing countries, including Sub-Saharan Africa, often unique and situationally dependent solutions are necessary to meet user needs with limited resources. In the case of RTC, the main goal of computerizing the library was to teach students to connect to information in new ways. The intersection of the students' respective African cultures with the Western cultures of libraries and academia created many questions. These questions had few, straightforward answers, but instead required patience, understanding, and the ability to look at the entire picture of library service.

And, in conclusion, it is important to remember that despite the challenges of being a librarian within another culture, there are also many joys. Global librarians choosing to work outside their home country will learn many life lessons. Some of these lessons will be about library service or how to adjust their way of living. But many of the lessons will be more personal, including: learning to work with people from other cultures, understanding different parts of the world, building relationships with people from another culture, and seeing the world through a different lens. During the course of the project at RTC, some of the most important lessons were not those taught about the computers or cataloging or libraries, but rather the lessons of humanity and learning and choosing to see the world through a new perspective.

## **Appendix: Questions Asked In the Library**

Working in another culture will help any librarian develop creative thinking skills. In this project, most of the questions asked fell into several, broad categories. These included questions about libraries, the roles of computers, cataloging, and how a specific culture affected the utilization of these

resources. Additional questions are listed here in order to encourage the reader to think about the bigger picture of organizing a library within another culture. Many are applicable to work with new communities or to understanding cultures within a home country.

## **Libraries**

- What is the goal of the library?
- How is it used? How can it be used more efficiently?
- In what ways do patrons already seek information?
- How does the intersection of local culture and academic culture impact library services?

## **Cataloging**

- What type of ILS is best for this library? How much can we pay? What about web-based? What will be easiest to maintain? What do other area libraries use?
- Logistically, what is the best way to take all books off the shelves, catalog them, and then put them back in a new order? Without having to touch the books more times than necessary? And not to interfere with students' research?
- Should the library use a Library of Congress or Dewey Decimal classification scheme? Or a home-grown system? Which will students understand better? Which is more widely used in the region?
- Will barcodes be used on each book? If so, how will they be obtained? Is a barcode scanner also necessary?
- What other supplies (labels, etc.) are necessary? Can they be obtained locally or must they be ordered from the US or Europe?

## Computers

- What is the general level of computer understanding among the user community?
- What are the best ways to introduce students to computers? One on one? Mandatory classes? Voluntary workshops? Which works best in their cultural understanding of learning?
- What types of research databases are available for free online? How can patrons access them?
- What kind of work can be done with no power and/or internet?
- What are the best ways to allocate time spent on public computers? How can all students have access? Is it better to let them work alone or in groups?
- How can computers enhance the goals of the library?

## Culture

- Many students come from a traditionally oral culture...how can books and reading be promoted?
- Earlier education and ways of learning (i.e. memorization and repeating) affect how students are used to learning in college. How can the library encourage research and critical thinking?
- Many users have never been inside a library...what are the best ways to introduce them to the purposes of libraries and the services provided?
- In other cultures the sense of community and borrowing is different. How should the idea that books must be returned on time be explained? Should there be a due date?
- What are key cultural values that can be incorporated into the library?
- What are some key library 'standards'? Are they cultural or universal?

- Is it possible to meet the needs of patrons when they come from different cultures? How is this best done?
- Community and relationships are important in this culture...how does that carry over into the librarian's role? How can relationships be built with students and staff at the college?
- How can the work in the library be sustainable? That is, after the librarian goes back to the home country, who will continue the work?

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# **SHIFTING ROLES: LIBRARIANSHIP IN A GLOBAL COMMUNITY**

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# THE LIBRARY HAS LEFT THE BUILDING: MOBILE LIBRARIANSHIP'S NEW 21<sup>ST</sup> CENTURY ROLE

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SARA WINGATE GRAY

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## ABSTRACT

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This chapter presents and explores mobile library and information services in the context of a digitally-mobilized population of publics. Examining models of praxis, it explores how the concept of liminality may be a useful and relevant addition to library development and theory. Case study examples of non-mainstream, radically alternative and innovative, moveable libraries and itinerant librarians provide the context for a discussion on how these avant-garde libraries may provide some of the answers to twenty-first century librarian roles and library re-visionings.

**Keywords** Mobile Libraries; Librarians; Library Role; Library Services; Library Skills; Bookmobiles; Ambiguity (Context); Liminality; Library History; Library Development; Information Seeking; Information Technology; Trend Analysis; Public Libraries; Library Administration; Theories; Case Studies; Models; Adoption (Ideas); Futures (of Society).

# THE LIBRARY HAS LEFT THE BUILDING: MOBILE LIBRARIANSHIP'S NEW 21<sup>ST</sup> CENTURY ROLE

With the advent of digital and mobile technologies, library and information services to patrons are finally coming of age. At the same time, twenty-first century individuals and user-communities, formerly attuned to a prior interaction model of nineteenth and twentieth century hierarchical structures, now expect and demand a greater, and more personal, engagement and interplay between themselves as individuals and groups, and the institutions that serve them. User-curated and created content is thriving, while greater user-participation in helping to develop, explore and sustain such services demonstrates this brave, new library world of public engagement and interchange: one where collaboration and co-operation, rather than authority and hierarchy, rule the day.

This shift towards the personal, and personally-engaged, user – or nascent information seeker – has had ramifications for library and information services and institutions, already familiar with traditional methods of managing user expectation and behavior. Libraries and librarians with a globality of vision and professional purpose are recognizing that the best innovation is driven by ensuring people remain just as important as the technology which has kick-started this twenty-first century library landscape. Such neoteric library services are not only directly involving their users, but also reaching out beyond typical physical building and mobile device-oriented structures, to extend a hand of library and information greeting to the human user, quite literally, in the street. Here, the library has left the building, and instead thrives and survives by encountering individuals, both by

chance and choice, strolling out in this sprawling, digital and physical network of human geographies.

Services provided by libraries, and by those involved as members of the library and information professions, may have historically often been commonly represented as centering around physical buildings containing physical collections, but Too's (2010) deconstruction of the Alexandrian library, considered as the "dominant model for the ancient library" (p. 7), demonstrates in fact that new explorations of models of library services and provision (historical or otherwise) can often tell undisclosed narratives, in this instance revealing the ancient library as "a far more complex and multiple entity than a building" (p. 13). Here, in Too's account, the ancient library is instead defined by its hybridity, and it therefore "cannot be a fixed and rigid institution." It is animate and purposive, "a collection of texts created by people with particular ideas about what a library might be, and so is established amidst a set of intentionalities" (p. 10).

Such explorative discourses can be seen to be of particular significance if, as Too contends, the "Alexandrian library continues to function as a symbol of the ideal library even at the beginning of the twenty-first century" (p. 7), providing useful reference in the context of mobile librarianship and what I shall go on to describe as *extra muros* library praxis, a distinct phase of which, now, is arguably emerging, explicitly bordered and bounded by the possibilities which digital technologies bring to individual users and providers of information services, more than ever before both physically and digitally mobilizing.

Using the term *extra muros* enables a grouping together of practices (both historical and current) provided by library and information services which are, in the first instance, most often performed external to any static site designated as a

library or library building, and as such intrinsically incorporate mobility. The historical examples of the Washington (USA) library wagon, “drawn by a pair of sturdy horses” (“A Library On Wheels”, 1909) and the 1858 (UK) “perambulating library” of Warrington’s Mechanics Institute (Eberhart, 2006, p.218) clearly serve as founding models for more recently provided ‘bookmobile’ or mobile library services, while twentieth and twenty-first century examples now also extend to “outreach programs” in senior citizen residencies; Finnish Internet buses; the elephant libraries of Laos and Thailand, and the donkey-drawn libraries of Zimbabwe, just for instance. Illustrative of ‘libraries beyond buildings’, what additionally demarcates such mobile library services as extra muros praxis is that they occur as forms of library temporariness, encompassing a shifting between states, identities and possibilities.

There has always been a multiplicity of terminology in use for variations of mobile library, reference and information services. Rudin (2008) notes, in the context of academic librarianship, that terms for those “who work outside of the library proper” range from “outreach librarian, outpost librarian, field librarian, and satellite librarian” (p.71) through to “embedded … liaison, blended … diffuse, satellite, and disembodied librarians… librarians without walls and librarians on location” (p. 60).

Mobile librarianship through the ages has indeed transitioned, and it is through a more detailed examination and understanding of this library praxis as extra muros that it becomes possible to fashion new forms of library animation relevant to us, as beings both physical and human, in this digitally-primed technological period of our times.

Conceptions of extra muros can be located in the word “extramural”, defined as “outside the walls or boundaries of a

city or town”, the adjective claiming its personal etymology from the Latin “*extrā mūr-ōs*”, literally, “outside the walls” (Oxford English Dictionary Online, 2012), where the preposition “extra” (a contracted form of the Latin “*extera*”, meaning “outside”) introduces an emphasis related to exteriority, and arguably beyondness. Further etymological tracings present the sense of “a boundary, a border” (“*mere*, n.2”, OED Online, 2012) by navigating through the meanings ascribed to the word “*mure*” (“*mure*, v.”, OED Online, 2012), in verb form presenting as to surround (with walls) or wall in; and as noun and adjective, simply “[a] wall” (“*mure*, n. and adj.2”, OED Online, 2012).

These conceptions are clearly present in library and information services physically operating outside of designated library building walls, where typical and traditional library boundaries are left behind, as “[t]he general idea of the carrying about of the means of instruction ” (Brown, 1856, p.65) requires that extra muros libraries must venture out and away from designated library spaces, instead entering into the public and private worlds and spaces of the everyday, of both individuals and communities.

As the library moves out into the everyday, so does its geography of focus: the space it occupies experiencing library by permeation. In effect, this space, and those people present in this space’s time, experience this as transition: now we are in a library, now we are not. Here, therefore, extra muros library encounters likely move between borderless states of acquaintance, experience, intimacy, co-operation and assistance, existing as possibilities opened up by this creation of space betweenness. This, of course, presents new challenges to traditional understandings and methods of practice.

The “most noticeable feature …[being] the fact that the book [or information] is brought to the individual, instead of

compelling him to go weary distances to the library" (Kimball, 1903) inverts the typical and traditional experiential relationship between libraries and users, instead directing or channeling *out* information sources via a library that moves and meanders *towards* the individual. This library movement also co-exists between two other states: it may appear as anticipated and also as unexpected, and inclusion of the factor of uncertainty also has performance ramifications.

In this transient mode, marked by both a departure and arrival, the library journeys to, and from, person to person, and is typified by experiences that are forms of a wayfaring which may not have clear navigational boundaries (be they geographic, psychic, corporeal, or spatio-temporal). It is arguably an experience dominated by "the subjunctive mood ... the mood of maybe, might be, as if, hypothesis, fantasy, conjecture, desire—depending on which of the trinity of cognition, affect and conation is situationally dominant" (Turner, 1986, p. 42).

This is, in fact, the *liminal* realm, and library and information services positioned here may be distinguished as liminal spaces of practice, that is "[o]f or pertaining to the threshold or initial stage of a process" ("liminal, adj.", OED Online, 2012). Stemming from the Latin, *limin-*, *limen*, meaning "threshold", concepts of liminality originate from the field of anthropology, and are explicitly associated with the work of van Genepp (1960) and Turner (1969, 1982, 1986, 2004) – who describes the attributes of liminality as "a no-man's-land betwixt and between" (1986, p. 41) where "liminal personae" are "necessarily ambiguous, since this condition and these persons elude or slip through the network of classifications that normally locate states and positions in cultural space" (2004, p. 79).

Alongside insights from anthropology, it is possible to place understandings gleaned from other fields of theory: liminality is also ascribed with the potential to “make... available new options for experience and relation that are not possible, or desired, within the constraints of established, conventional order” (Rowe, 2008, p. 130). This also has valency for library and information services operating ‘out in the wild’, perhaps also beyond established conventional walls of practice, prompting and requiring new modes and methods of interaction. Applying ideas of liminality to these newly-formed and found spaces *for* a library, or information service, frames an experience which inherently incorporates transposition. It is a conjuring process, if you will, of one shape or form of space into another, the library and its services temporarily occupying, and thereby recomposing, sites and spaces it comes across and impermanently inhabits. This is library by interfusion, and here the realm of the library is at liberty.

## **Case Studies of Contemporary Praxis**

### **The A47 mobile library**

Navigating and parking amongst the diverse spaces and conurbations of Mexico city, A47 is a large truck-sized vehicle (c. 10 meters x 3.34 meters) housing an “itinerant contemporary-art book collection”, founded and maintained by the philanthropic foundation Alumnos 47 and “conceived as a dynamic and active entity where its services are not limited to book consulting” (López Maldonado, 2012). From the outset, this mobile library project imagines “other ways to connect knowledge and people, other ways to socialize what’s in [the library]”, aiming to create new modes of perceiving and expressing the content and form of the library itself.

Operating as an autonomous mobile public library of contemporary art, the A47 “bibliomovil” functions as a permanent extension of its (yet to be completed) library building head-quarters, and is specially designed as a means to create “an open environment wherever we park the library” (López Maldonado, 2012). Extra muros library praxis here extends to both the sites of the truck’s occupation (such as outside schools, workplaces, parks, or other open public spaces) and the physical form of the truck-library itself: Conceived as a multi-functional structure, traditional exterior and interior boundaries of space are in fact disrupted as the walls of the truck (consisting of 26 movable panels) can be opened out to reveal its insides. This is a library capable of being turned inside-out, a place where the borders between inner and outer space can shift, acting in accordance with the needs of its users, services and the exterior physical space it has chosen to occupy temporarily and open in.



**Figure 1. Interior of the A47 mobile library. Photographs by Ramiro Chaves (© 2012, Alumnos47. Used with permission.).**

This flux of states is, by definition, a liminal zone, and hence carries with it elements of transition – as the library is refashioned an “area of ambiguity, a sort of social limbo” or a time and space “betwixt and between” (Turner & Turner, 1982, p. 202) opens up, and it is in this gap, the lacuna of the library, that new embodiments of its experience can come to be envisioned and formed. In the A47 library, walls do not *surround*, instead their use subverts the traditional delineations of library space, so that

you don't take off the walls, you just open it ... and if you are far away it seems like there is nothing there ... Inside the mobile library users have the view of the street even though they are in a “close[d]” space. From the street, pedestrians can see the inside of the white box: people reading, having lectures or watching a movie... When it's a bit crowded, or maybe on weekends and especially if the spot provides the proper shadow –maybe from trees or something– we put the chairs outside the truck and people... take the books outside and read them. (López Maldonado, 2012).

Here, the shifts in state also manifest a change in the designation of space, exposing what was once internal and private, to public participation and gaze, and while “[o]utside and inside are both intimate”, they remain in transition, “always ready to be reversed” (Bachelard, 1994, pp. 217-8). Outdoor activities, interventions or engagements provoke publics and the library into interminglings, or immersions. Occurring in and of the public, these publicly performed acts resound as key themes for the project: For A47 it is “not just [about]... bring[ing] books to citizens into public space, but [also] to take out contemporary art products from their common places of consumption, such as galleries and restricted libraries.”

López Maldonado, mobile library project co-ordinator, sees the A47's challenge as "to break the conception of a library as restrictive space", aiming to "create new publics". Restructuring the inner space of the library, "depending on the activities you are going to do inside", becomes a salient feature of the "way to break the boundaries between the inner and outer space", and this shape-shifting behaviour is mirrored in the possibilities individuals experience on entering this liminal landscape of extra muros library action.

Rowe (2008) notes that such liminal encounters can provoke "acts and behaviours that, while neither likely nor specifically intended, are the desired product of the liminal context" and in this way "liminality becomes a kind of dynamic core within which cultures produce, reproduce, and store possibilities of social action and being" (p. 130). The A47's public interventions, "made in the library" (López Maldonado, 2012) and made from concepts *of* the public library, steer towards these potentialities: Its "library for games", initiated outside a large, historic cultural center in 2011 with the invited participation of "pedestrians and people who were waiting there or just passing by" is such an example.

Created in the context of Children's Day (April 30<sup>th</sup>) these transient passersby were temporarily stopped, stilled, and then reanimated and restarted as they wandered into, and out of, this library space of games. Asked "to remember an old game they used to play when they were kids...[we] ... made a collection of old games, and then with marks, we marked the floor, and created new games [on] the floor, or playing with the trees, roping strings." This "ludotec", complete with a roving selection of reference books curated from the internally-housed A47 itinerant collection and "related to these kind of [game] practices", creates and moves between states of authority, authorship and ownership, skipping amidst, and archiving in-between, individual and collective memory. Demonstrating and

exploring information-sharing characteristics, it is a library space which produces the possibility of new states of meaning and knowledge, redefined and renegotiated in public communion.



**Figure 2. Interior of the A47 “bibliomovil” with its walls “opening”. Photograph by Ramiro Chaves (© 2012, Alumnos47. Used with permission.).**

## **The Itinerant Poetry Library**

Sharing the liminal territory of extra muros library spaces, The Itinerant Poetry Library (TIPL) has as its modus operandi the liminal states of space itself, temporarily opening in and occupying, for either days, hours, or minutes at a time, a specific public or private space, before moving on to another, and another different community. Having now operated in thirteen countries, and in two hundred-plus individual locations worldwide since its orbital beginnings in 2006, this ‘pop-up’ reference and information service was

possibly the first library entity to begin using Twitter (in 2006), and to use it explicitly to provide real time, geo-location information, so that people already local, mobile and on the move in the physical environment are able to seek it and its services out.



**Figure 3. Screenshots of tweets by @librarian. Image by SWG (2012, No Rights Reserved-CC0-Public Domain.).**

These temporarily created library services and spaces are alchemized in TIPL's instantiation of extra muros library praxis explicitly into sites of play: here enacted is not just a free, public "travelling poetry library" service but the performing and performance of "the library" per se. I speak, here, as the author of, and actor in, this state of play, which enacts real live library service, performance art and social experiment, all at the same time, in fact. Turner (1983) notes that "play does not fit in anywhere in particular, it is a transient and is recalcitrant to localisation, to placement, to fixation" (as quoted in Turner & Bruner, 1986, p. 356) and my playground of the concept of library is not supposed to provide necessarily clear, fixed substantiations as such. Rather, it is a place for positioning questions, amongst others: "What is a library?" and "What might a library be?"



**Figure 4. The Itinerant Poetry Library & Librarian at Flowershop, San Francisco, 2008. Photograph by Downey (© 2008 SWG / Downey. Used with permission.).**

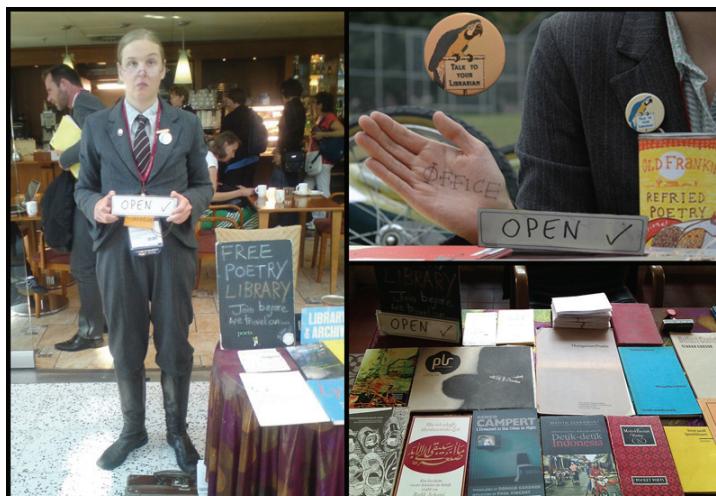
One of the key questions for TIPL, and in fact a query that intrinsically guides its instants of library openings, is most simply put as “Where might a library be?” Aiming to “reach the parts other libraries have yet to reach”, and although opening in more typical extra muros, liminally-bordered places such as parks, outdoor cafes, fields or, literally, out on the street, librarying also extends across the threshold of other walled space to include locations such as cocktail bars, conferences, a warehouse (London), a pizza takeaway (San Francisco), a ladies bathroom (Rotterdam), a boat on a loch (Scotland), a hotel (Dublin), a café (Leipzig), a retirement home (Oakland), and last but not least, a cemetery (Boston), to name just a few notable geographies of its service.

This is a library founded in seeking to locate its potential users by navigating the highways and byways of times and spaces where people already naturally collide, congregate and co-habit. Its arrival is, necessarily perhaps, unexpected, and as such means that more than 50% of its users, finding a library come upon them at a certain space and time, aver that they did not intend to come to or join a library that day. I have come to call this “library by stealth”, and it forms part of my library’s commitment to providing “not yet knowingly needed” knowledge and information services (Wingate Gray, 2007) as people may have “dormant... or unrecognised [information] need[s]” (Nicholas, 2009, p. 19). This is an extra muros library praxis founded in the potential of uncertainty or serendipity, and formed of happenstance meets.

Individuals encountering the library begin, on the whole, to perform typical library behavior, finding themselves, accidentally, so to speak, already “inside” one, and are helped (or indeed hindered) in this process by myself in my role as “knowledge overseer”, The Itinerant Poetry Librarian. This is a library ritualized by means of performance, but grounded in recognizing the reciprocity required between an information seeker and librarian. It is a collaborative effort of arrivals and departures, seekings and findings, integral to which is the provision of a level of authority willing to be challenged and amended through these collaborative acts of resource exploration and information-sharing.

Users are able to contribute items directly to the library’s collection, in turn forming publicly-curated material which is often specific or niche to a region or locale, language or context. These items, in turn and time, are also shifted to new borders and contexts, as the service physically moves “further afield”, to a new community, town, city or country, here, then, sharing these works from previous communities, and continuing to add new ones from this newly-encountered company.

In this performative portrait of “the library”, paint is applied as a collaborative act, with individual members of the public also choosing how, when, where, and what colors are to be painted. Books are borrowed, and read, or not. People ask the librarian questions, or ignore her. Typical and atypical circumstances constantly arise and surround us. Re-framing and refashioning, through performative, public expressions, and manifestations of, “the library”, this is often an alchemized environment, one where certainty plays a minor role. This is, in fact, useful, as “[s]ome things are so solid in their reality that one forgets to dream upon their name” (Bachelard, 1971 p. 31), so that here, in this permeable, playful, landscape, together we are able to re-imagine and re-invent what a library might be.



**Figure 5. Photograph collage of The Itinerant Poetry Library opening up. From L-R, clockwise: in a coffee shop at WLIC IFLA, in Helsinki (Finland), 2012. Photograph by A. Corble (© 2012 SWG/Corble. Used with permission.); in Colonel Summer's Park, Portland (OR, USA), in 2007. Photograph by S. Mueller (© 2007 SWG/Mueller. Used with permission.); in Cologne (Germany), in 2012. Photograph by SWG (© 2012 SWG. Used with permission.).**

## Mile High Reference Desk

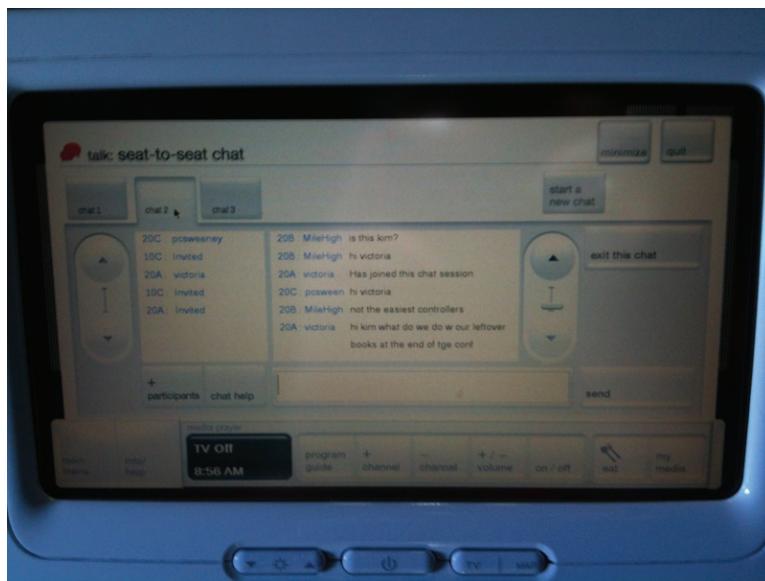
Mile High Reference Desk (MHRD), akin to TIPL, operates as an autonomous public service (disclosure: I am a mentor to this project), with Andrea Davis at the helm providing reference and information services sky high and in the clouds, via whatever airplane she finds herself on: “[i]t’s a carry-on baggage library! By TSA definition, it’s mobile” (Davis, 2012). Her aim with MHRD is “to help people on the flight, as they’re just kind of stuck, in one set place, and if they didn’t bring reading materials, or had questions about where they were going and didn’t know who to talk to, then why not come to a library and try to find out?”



**Figure 6. Screenshots of tweets by @Mile High Ref Desk, in action sky-high. Image by SWG (2012, No Rights Reserved-CC0-Public Domain.).**

Starting by collecting supplies to form part of MHRD’s aerial reference and information services collection, she saved items “that were being tossed out from our library, microfiche, old catalog cards” etc. (Davis is Reference & Instruction Librarian at Dudley Knox Library, Naval Postgraduate School) and added to the selection an “Etch-A-Sketch™ … gaming happens in libraries! … [and I] had my computer [so that on] flights that had wifi … [I was] able to use online resources”. The inclusion of “maps, public transport brochures, and other points of interest (when available) for destination locations” means that she hopes to provide “a tailored service dependent on the current flight’s audience.”

Incorporating an element of performance into this high-altitude-embracing reference and information service, its intentions are also just as full of humor and playfulness as those of TIPL, and similarly stem from a deep-seated personal belief in “[e]ngaging with public... Pos[ing] to the public a re-definition of [the] commonly used term and outdated concept of “library” = not just books, and not just a place you visit” (Davis, 2012). Working with the environment you find yourself in, is also one of the defining themes of extra muros praxis, and Davis’s focus on reference services, as MHRD is “a ref. desk not just a library” found a new use for the “chat-function between seats”, her “MileHighdesk librarian” taking the time to use this tool to answer “whatever traveling questions someone might have”.



**Figure 7. “seat-to-seat” chat screen for MHRD, used for reference querying during flight. Photograph by A. Davis (© 2012 A. Davis. Used with permission.).**

This is, just as TIPL, an experimental library excursion, and with operational flights still in single digits during 2012, this is an emerging praxis, but “gradually growing in scale and acceptance: The past two flights, the flight attendants allowed us to make an announcement on the PA system, and that improved foot traffic” says Davis. Providing a transient reference and information service in action, “in a traditionally closed environment”, which also traditionally does not provide “an outlet to ask questions or browse materials users can borrow and return, not purchase”, this process is inevitably surrounded by liminality, here users may “just [come] by and [don’t] know what to think” (Davis, 2012).

Uncertainty, then, in extra muros library praxis, is in some ways a defining aspect. That these physical interactions and intersections between library information services and people explicitly occur in the context of temporariness also defines this type of library experience. Explicitly distinguishing extra muros library and information services in this way is important: It is precisely because these types of services exist ‘betwixt and between’ physical library spaces, and in some instances explicitly provide an ephemeral, transient, library and information service in action, that an engagement with –rather than against– ambiguity, uncertainty, polysemy and chance, should be carried out. This is because here, “out” in the liminal library field of play, “the nature of... communication changes” (Johnson & Alexander, 2008, p. 31), morphing from more formal or habituated modes of interaction, to individual encounters, defined by “personal relationships” (Haines, 2004, p. 19) and “casual...conversation” (Johnson, 2010, p. 10).

What we are witnessing then, in this new twenty-first century library landscape, is “a storehouse of possibilities, not a random assemblage but a striving after new forms and structures, a gestation process” (Turner, 1986, p. 42).

## Conclusion

Extra muros library praxis, manifesting in temporarily designated spaces and sites of action, and for temporary periods of time, requires that these situations are, in some certain ways, informed by uncertainty, and are therefore characterized by shifting, anomalous states and qualities – be they social or collective; personal and individual; geographical; or the states of knowledge-seeking behavior, and the different states of knowledge itself.

This emphasis on threshold-crossings and shifts between states, always informed by transience, aligns particularly well to current and likely forthcoming trends that involve human interaction with digital technology. Smartphones and tablets hit their “inflection point” (Meeker, 2012, slide 25) in late 2010, meaning global shipments of these tools surpassed total figures for shipments of PCs for the first time ever. Global mobile internet traffic now forms 13% of total internet services, while in May 2012 in India, mobile internet traffic overtook desktop internet usage for the first time also, with other countries likely soon to follow (Meeker, 2012, slides 15-16).

Map this rise in social, local and mobile behavior of individuals, digitally-technologied-up and physically mobilized as never before, to the localized and mobilized nature of extra muros library praxis, and there is, in fact, the potential for a potent new growth form of library and information services, specifically operating out in public, and out amongst publics. Reference queries in public libraries in the UK have been in continuous decline for over a decade (LISU, 2012), so adapting to the behavior of users should in effect be the baseline for mainstream library and information services if they are to continue to be used, and if they wish to continue to remain relevant, and not least succeed in their mission statements.

In this emerging landscape, however, the signs are that, digital technology notwithstanding, there remains a clear role for human to human interaction. The British Library/JISC-commissioned report of June 2012, in the context of academic research, notes that individuals considered “[l]ibrary staff assistance with finding/retrieving difficult-to-access resources” one of “the most valuable” services offered (Education for Change, 2012, p. 59), which mirrors Nicholas and Herman’s (2009) point that “when the need is for information that conveys complex ideas and thoughts, it is best attained via face-to-face interaction with human experts” (p. 105).

That people exhibit human information behavior in the guise of sampling and selecting, “choosing the best/most suitable/most interesting” information, gleaned from transient rovings and grazings, “taking a chance on what comes to hand” (p. 70) is also especially relevant for imagining how library and information services could choose to newly interact with these mobile populations. Forms of extra muros library praxis, happening upon “roads … cross-roads … roadside benches” (Bachelard, 1994, p.11) echo the shape of this information-seeking process, and move the emphasis to the individual, each encounter discrete, derived by and arrived at through the iterative acts of “establish[ing] and maintain[ing] contact” (McColvin, 1942, p. 115).

This is the realm of the moveable library and the itinerant librarian, taking the library with her out into the world to meet her patrons as they go about their busy day-to-day lives. Users who may be too busy, or otherwise occupied, to be able to physically get to the library or to recognize what their information needs might be, yet remain in need of answers that perhaps only the library and the human librarian touch can properly provide.

This form of librarian roaming, transient and interactive, may not, necessarily, come naturally to all. Davis cites, alongside her professional librarian qualifications (MLIS, Simmons College, 2010) her background in “catering …[or] being the person that gives you that flyer on a street corner, so I’m not scared to talk to people who are strangers, and try to engage them, and be personable in public spaces” as part of her repertoire of skills (Davis, 2012). López Maldonado (2012) is an historian by background, but “for many years [worked] … in rural educational projects in Mexico” teaching older people to read.

Many alternative, avant-garde library projects in fact have people at the helm who are not officially “qualified” librarians, but who take the qualifying potential of “the library” both seriously and professionally, perceiving it only as fully intact when the vision remains humanly. This likely speaks more to the perceived compelling need for newly-created library spaces than to instances of the profession’s “de-skilling”, and the work of other extra muros libraries such as Street Books in Portland – “a bicycle-powered mobile library, serving people who live outside” (Street Books, 2012); or the springing up and out worldwide of the “Occupy” libraries suggests this movement is growing.

Functioning with the knowledge that not all potential users will or can take the initiative to come to the physical location of the service itself is, therefore, a powerful tool in a twenty-first century library’s service philosophy. Understanding more about the processes of our information needs and experiences, in both a digital and physical world where, as humans, we are apt to stray from a definite course, and naturally incorporate divergence, erraticisms or digressions – not least in how we may transition toward knowledge, and how physical location and space can affect this transmission – are just some of the jigsaw pieces required in completing the picture of this

twenty-first century library, reference and information services landscape.

It is a divergent panorama, one where future modes of services can be formed, and informed, by a reaching back to traditional librarianship ethics in tandem with a more clear understanding of how transient users and uses shift traditional interaction models. That “[t]here is good authority for going out into the highways and byways to find guests for a feast” (Dewey, 1901, p.31) suggests libraries would do well to re-conceive and consider how we can more fully enable our users, busying and living away in their own lives. By striking out, we are able to pass on our “good” information wishes, beyond the borders and boundaries of the “fixed, static institution” (Yeo, 2010, p. 22). The examples here of extra muros praxis, provided by alternative and autonomous, avant-garde library and information services, additionally explore the conceptual boundaries of “the library” itself: in such explorations, it is hoped, some of the answers to twenty-first century librarian roles and library re-visionings may indeed have been found.

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# LOCAL CONNECTIONS TO GLOBAL COLLECTIONS: THE POWER OF INTERLIBRARY LOAN SERVICES

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## ABSTRACT

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Interlibrary loan services facilitate access to both print and digital information, be it from other libraries nearby or from around the world. ILL librarians and staff members also provide integrated, or global, access to library and information services, in general. They help patrons discover holdings in their own local collections, online open access material, and items only available for purchase from publishers or booksellers. By working closely with colleagues in other libraries, and despite copyright and license restrictions on the sharing of information, as well as limits in budgets and staffing, library resource sharing specialists offer both global information and global information services.

**Keywords:** Interlibrary Loans, ILL, Library Resource Sharing, access, academic libraries, OCLC, IFLA

# LOCAL CONNECTIONS TO GLOBAL COLLECTIONS: THE POWER OF INTERLIBRARY LOAN SERVICES

## Introduction: Doing Good by Doing “ILL”

*I remember the joy as a small child...of the interlibrary loan. I'd wanted to read a W.S. Gilbert play, and they didn't have the plays of W.S. Gilbert, and the librarian explained to me they could do an interlibrary loan...And the amount of power was so exciting. And after that I started doing interlibrary loans all the time, because—it was like nothing could stop me.*

Neil Gaiman

Surely, the legendary libraries of history (e.g., the Library of Alexandria) and literature (e.g., Borges' Library of Babel) represent compelling symbols of unlimited access to global information. So does the Internet. However, in reality, neither the Internet, nor any great library, encompasses a truly universal collection. Still, it is in order to meet the needs and expectations of contemporary library users, attract more of them, and preserve information for the future, that librarians collect, organize and facilitate access to information no matter its origin, format, or source - be it another library, bookseller, publisher, database vendor, or author. They maintain their stacks, and they continue to buy material through collection development policies and patron driven acquisitions. They also license access to full text databases, and when information – print, digital, domestic or international - is unavailable locally, they borrow it from other libraries. This, they call library through what is variously called library

resource sharing, interloan, document supply, interlibrary loan, or more easily, but a bit unfortunately, “ILL” services. (Neal, et. al., 2011)

Librarians are using innovative technology and rethinking policies and procedures to provide increasingly efficient, effective and global services. Sharing information across time, space, and other boundaries is not magic though. It requires time, money and negotiation, and always has. The labor-intensive work of ILL librarians and staff members helps innumerable people to actualize the promise, premise and potential of libraries and librarians as they open up the world and expand people’s horizons and opportunities. This benefits lending librarians, by demonstrating the continued value of their collections. Borrowing librarians who provide ILL as a core service can meet many more of the information needs of their patrons. And, ILL users, as well as society as a whole, also clearly benefit from access to more information, as they learn from posterity and contribute to the world and its future.

In today’s global society, information needs are also global, and opening up the world is a particularly descriptive metaphor for what ILL librarians do. The International Federation of Library Associations (IFLA) states that borrowing material from, and sharing holdings with, libraries in other countries, is “a valuable and necessary part of the interlibrary loan process” and in order for libraries to achieve this, “each country has a special responsibility to supply its own national imprints to libraries in other countries.” (IFLA, 2009, <http://www.ifla.org/files/assets/docdel/documents/international-lending-en.pdf>) Academic librarians help advanced students, faculty and researchers collaborating with contemporary scholars in their field and undergraduates enrolled at universities in other countries. Public librarians work with immigrants and second language learners and speakers. Businesses are multinational, as is medical research. With

information now so easily discoverable online, librarians working to support the local communities they directly serve – and who they need support from – are pressed to provide access to global information, regardless of provenance or geography. (Simon, 2013) And, as user expectations and demand grows, librarians can also more successfully campaign for the resources that are essential if libraries are to transcend the barriers to and costs of providing both domestic and international ILLs.

The same diversity that defines the contemporary world and enlivens and enlightens us all as global citizens also creates challenges for information access. ILL librarians, today, negotiate a variety of national, cultural, legal, technological and economic boundaries in order to connect people and information. They decipher citations with misspellings or idiosyncratic transliterations. They track down holdings in online catalogs or via emails with other helpful librarians in the relevant country's national, special and research libraries. They arrange loans, payments, shipping, and enforce user requirements, transcending time and space, all in order to successfully connect people and information.

Thus, their work reflects the interconnectness and interdependence of the world, as well as strengthens it. Certainly, some people remain solely interested in no more than what is readily available on the Internet, or their local library's shelves. However, if we are serious about strengthening the global community, then we must share information globally, accept different ways of seeing and understanding the world, and humble ourselves before the vastness and variousness of the world's knowledge. If the education of global citizens is important to society, then global libraries, which in turn require global librarians, are clearly valuable and worthy of support.

By cultivating the appropriate knowledge, skills and attitudes to successfully operate on a global scale, and striving towards the vision of ever increasing – or, ideally, universal - access, ILL librarians are truly “global librarians.” By sharing material with international, as well local, regional, and national partners, they are “librarians without borders.” And, by serving as a bridge - whether to distant library collections, online information, or other services within their own libraries - ILL departments connect their local community to the wider world of information and its potential power.

## **International ILL: Providing Access to Global Information**

*The knowledge of different literatures frees one from the tyranny of a few.*

José Martí

The precise number of international ILL transactions is difficult to determine. Much of it is done on an ad hoc basis or through dedicated systems, rather than through one integrated system. OCLC, the largest library cooperative in the world, facilitates over nine million ILL transactions annually, but most of these are domestic loans. Still, the potential of international ILL is evident. OCLC now has 72,000 library members, from 170 countries and territories. (<http://www.oclc.org/worldcat/statistics/default.htm>) Although English is the single most represented language, 60 percent of their WorldCat database's holdings are non-English (<http://www.oclc.org/news/publications/annualreports/2012/2012.pdf>) encompassing over 470 languages. (<http://www.oclc.org/US/EN/worldcat/catalog/default.htm>) In addition, fifty percent of the British Library's document supply service customers are based abroad. (<http://www.bl.uk/reshelp/atyourdesk/docsupply/about/ourcustomers/index.html>)

International ILL services are also a main topic of interest in library journals, such as *Interlending and Document Supply*. IFLA sponsors biennial Interlending and Document Supply Conferences (<http://www.ifla.org/events/12th-interlending-and-document-supply-conference>) and their Document Delivery and Resource Sharing Section holds programs at IFLA World Congresses. (<http://conference.ifla.org-ifla79/calls-forpapers/strengthening-access-to-information-the-future-of-resource-sharing>) The Rethinking Resource Sharing Initiative is another group working to improve ILL services in all types of libraries all around the world (<http://www.rethinkingresourcesharing.org>), as is the International ILL committee of the American Library Association's RUSA STARS section. (<http://www.ala.org/rusa/contact-rosters/stars/rus-stainter>)

Despite the many longstanding barriers of time, space, technology, law, etc., the mutual respect, cooperation, technological innovations, and the policy and procedural improvements of librarians working together enables the success and efficiency of both domestic and international ILL, today. However, equally enduring concerns about preservation, safety and local access also remain as barriers to increased sharing of information among libraries and their patrons. One of the earliest stories of international ILL also provides one of the earliest examples of sharing gone wrong. In a transaction that has created quite a lingering negative precedent, Egyptian king Ptolemy III, in the 3<sup>rd</sup> century B.C., borrowed the collected works of Euripides, Sophocles, and Aeschylus from the Athenians. However, only copies were returned, the originals being kept for the Great Library of Alexandria; while he lost his hefty deposit, the broader effects and concerns of this transaction for international ILL linger even today. (<http://www.attalus.org/translate/extracts.html>)

In fact, for much of history, libraries and librarians focused primarily on preservation, providing only onsite access to those they directly served. By the 20<sup>th</sup> century, however, along with the general professionalization of librarianship, the importance - and challenges - of sharing information resources among libraries was recognized. Among other things, this led to the creation of IFLA, in 1927. IFLA, in turn, created regulations governing international ILL, in 1936. Although much of this activity was halted because of World War II, in 1959 delegates accepted "International Resource Sharing and Document Delivery: Principles and Guidelines for Procedure" in order to rationalize the process and address concerns. (Miguel, 2007) These guidelines, last updated in 2009, inform international ILL practice today. (<http://www.ifla.org/files/assets/docdel/documents/international-lending-en.pdf>)

Many surveys have identified forces that complicate and limit access to international information. (Atkins, 2010; Massie, 2000; Bradford, 2008; Baich, Zou, Weltin, and Yang, 2009; <http://www.ala.org/rusa/sites/ala.org.rusa/files/content/sections/stars/section/internationill/2011ExecutiveSummary.pdf>; <http://publications.arl.org/rli275/2>, 2011) Variations in professional attitudes and cultural norms, high costs of digitization, staff, and shipping, and language barriers can all make discovering, requesting, filling and communicating difficult. (Bradbury & Cornish, 1992; Seal, 2002; Street, 2003; Gatenby & Goldner, 2005) On the other hand, online searching makes the discovery of international information easier, demand is growing, and safe physical and quick electronic delivery of information is now possible. Many libraries around the world have online websites with contact information, online catalogs and even mirror websites in English. Fears of loss, damage, or long loan periods associated with physical delivery have lessened with the tracking, insurance and express services now available and the ease of verifying addresses online or with a quick email. Translation services, of varying quality,

exist, as do software programs that can recognize different language characters.

So, ILL librarians are increasingly asked to do international ILLs, and are becoming increasingly conversant with overcoming the challenges and complexities involved in tracking down holdings and arranging for loans as they do them. (Bruno, 2010; Weible & Janke, 2011) There is a recognition that international interlibrary loan can benefit from proven and established best practices in domestic library resource sharing. (Neal, et. al., 2011) For instance, ILL librarians are already trained to be aware of, respectful, and sensitive to, the rules and conditions of the other libraries that they work with, so they are primed to be culturally sensitive to issues of language or procedural differences. Cultural differences can exist in everything from the ideal of open access to information, to the practicalities of mail delivery, to understandings of time itself. The effort of negotiating barriers and coming to mutually acceptable terms with all stakeholders is undeniable. Creativity, responsibility, and considered optimism in the face of real obstacles are required. However, by meeting the challenges of doing international ILL, both lending and borrowing librarians can successfully serve appreciative patrons, while enjoying and benefiting from the collegiality of an international network of supportive partners.

Technology has made the greatest difference in the ability of librarians to break down traditional barriers of both time and space, as they can now share digital copies of information electronically when copyright and contract law permit. Globalization, along with technology, has also heightened expectations of 24-7 service, and conveniently the time differences between, for instance, the US and Australia mean that service can be provided around the clock. Many libraries also now use the technology of OCLC's WorldCat system, which offers an automated, potentially even unmediated,

integrated system for requesting, tracking, paying and otherwise managing their transactions. However, there are also many libraries that are not OCLC members, or do not use them for ILLs, or do not use their payment system, and there is a lack of interoperability with OCLC and among the many other systems that they do use.

Cost remains another major issue. There is a dangerous, and incorrect perception, by some, that all information is online, or will be soon, so the money used to support ILL, or even libraries, would be better used for other purposes. One example of the serious ramifications of cost concerns can be seen in a recent decision by Canada's national library, the Library and Archives Canada. As of November 13, 2012, and despite controversy and continued protests (<http://www.savelibraryarchives.ca/>), they have completely stopped providing international loans. (<http://www.collectionscanada.gc.ca/ill/index-e.html>) This offers a cautionary tale about how international ILL is – or is not – valued and supported. National libraries are an essential part of international ILL, and in fact the more libraries of any size that participate, the better the system will work, so while efficiencies and improvements must be continually instituted service cuts in all libraries, from the largest to the smallest, must be continually resisted.

Still, whether physically transporting items through the mail, or digitally transmitting them, international ILL, like domestic ILL, has costs that must be absorbed or recouped by libraries in order to continue participating. Ad hoc arrangements, in particular, add to staff costs. However, costs can be managed through reciprocal arrangements or by charging necessary and reasonable processing fees. OCLC offers "IFM", a fee system that adds credits and subtracts debits on a library's OCLC bill as they lend and borrow. (<https://www.oclc.org/resource-sharing/features/feemanagement.en.html>) There are also IFLA vouchers (<http://www.ifla.org/voucher-scheme>). Librarians can

purchase these in their own currency and then trade them for loans and copies of library material. (Gould & Cornish, 1996) Some international libraries accept credit cards, although not all ILL departments have access to one. Larger libraries, or specialized ones, can sign reciprocal agreements so that they do not charge each other at all. For some libraries, invoicing and payment in foreign currencies are required, and some – e.g. Bibliothèque Nationale de France – offer reproduction services directly to patrons, rather than only traditional library-to-library transactions.

Beyond attitudes, knowledge and skills, librarians today must also focus on legal issues that restrict the sharing of information. (Davidson, 2009) These can include government censorship that makes people unwilling to make certain requests, or even scholarly embargos where information is kept from people in certain nations. However, even when there are willing patrons, borrowing librarians and lenders, and the physical or digital transfer of the material is possible, there are legal issues to deal with. In fact, these can threaten the very existence of library resource sharing through the acceptance of full text database licenses, contracts and copyright laws that limit the rights of librarians to share information.

The copyright laws of one's own country, as well as others, regulate the sharing of both print and digital material. Exceptions for educational and research purposes, such as fair use or fair dealing (in the US and Canada, respectively) need to be accepted more broadly, liberally and widely by all nations. (<http://copyright.columbia.edu/copyright/special-topics/international-copyright/>) There are also relevant international treaties, such as those of WIPO (the World Intellectual Property Organization, <http://www.wipo.int/portal/-index.html.en>) and the Berne Convention. ([http://www.wipo.int/treaties/en/ip/berne/trtdocs\\_wo001.html](http://www.wipo.int/treaties/en/ip/berne/trtdocs_wo001.html)) There are also customs requirements (forms and fees) for

goods shipped over national borders, even though there is no direct commercial value to libraries that share information for the use of students or scholars. (Public or special libraries that serve business information needs and charge fees for copyrighted information do operate under different contract terms and areas of copyright law.) Contract law takes precedence over copyright law when libraries sign limiting license agreements with publishers for access to electronic resources. With the rise of digital information, publishers are increasingly licensing information to libraries, for the use of their patrons, rather than selling it to them. This has broad implications for the preservation, as well as for the sharing, of information, both of which libraries exist to do, and have long done, with profoundly positive results. Some licenses dictate different rules for sharing within a country versus internationally. Others restrict ILL completely, or require unduly cumbersome procedures, like printing and mailing, rather than using electronic transmission.

However, continued education and advocacy, working through consortia, professional associations, and license-by-license can have positive results. Publishers depend on library purchases and must negotiate terms with them, so librarians must demand rights to share digital information, within copyright guidelines, as they have always done in the print world. This applies to both e-journal articles, as well as portions of e-books, although technical provisions for the time limited sharing of e-books is more complicated. Many licenses already do cover international ILL, but standard practices and license language would ensure this and simplify understanding of both rights and limits. (Neal, et. al., 2011) ILL librarians generally do not directly negotiate contracts, so they need to work with those that do to affirm the right to lend and borrow both print and digital information, internationally, as well as domestically. (Mueller, 2008) They also need to advocate for more liberal copyright laws in order to encourage the sharing of information

that properly attributes and rewards knowledge producers, while also encouraging the continued production of even more information and knowledge.

These challenges also represent opportunities for librarians who want to make positive changes. While they will not immediately or always succeed, if nothing else, their efforts send an inspirational message about how librarians are working to help people navigate and access the wide world of information, ideas and knowledge. Libraries and their ILL departments still offer one of the best ways to access information; the only way to access some, and often the least expensive, if not the only way, to access other information. This is why ILL librarians continue to break down boundaries, be they geographical, functional, or ones of policy restrictions.

## **Conclusion: Providing Global Library Service to Local Patrons**

*It is a very sad thing that nowadays there is so little useless information.*

*Oscar Wilde*

The ILL system is a holistic one, based on reciprocity, trust and service. It works precisely because of librarians who are motivated and willing to responsibly and effectively participate as both borrowers and lenders. One could even argue that the norms, values and terms of international ILL represent a healthy model for globalization, itself. A similar holistic – or global – outlook serves as the impulse for ILL librarians to act as a conduit between patrons and other library services. When fully staffed and well trained, they can – and do - connect people and information by offering integrated library assistance, in addition to helping them access locally

unavailable information. (Egan, 2007; Johnson et. al, 2011; Ta-Moore & Manino, 2012)

For instance, when someone makes an ILL request for something that *is* available locally, or freely available online, ILL staff can teach patrons how to find it at their point of need, when they are especially receptive to learning. This helps people get information more quickly, while also learning how to better navigate library and other information sources. They can come to see just what it is that libraries are paying for as well as why open access (OA) publishing makes sense for authors who want to share information. ILL staff can also determine when it is preferable – quicker or less expensive - to buy something, rather than to borrow it. This, too, gives people quicker access to information, while also enabling libraries to save money and build useful collections. ILL staff can identify catalog and serials holdings errors, so that people will discover what really is available. They can work with special collections departments to fast track the digitization of requested material (if it is within copyright regulations and can be digitized.) They can educate both authors and the public, as they advocate for open access publishing, institutional repositories, creative commons licensing, copyright laws, licensing/contract language and terms, and other initiatives that support the rights of libraries to share - and of people to freely access and use - information.

Even when an interlibrary loan request cannot be fulfilled, ILL librarians and staff members who explain why not are educating people about issues like copyright, publisher restrictions and the real costs of information. They can help further by referring them to other libraries or their own reference colleagues, or following up themselves with instructions on how to use local resources to find alternative sources. While many international requests remain difficult, or impossible, to fill, this is not inevitable. Librarians, with

appropriate support, would much prefer to satisfy all information needs. While the mere existence of ILL departments can serve as an inspirational symbol of unlimited access to information, it is how well they are supported and whether their policies and procedures encourage – or discourage - patrons requests for ILLs that really defines their value. Libraries can limit patrons to a small number of requests, they can charge fees, they can refuse renewals of books, they can choose to not even try to facilitate international ILLS; or, they can do much more in terms both service and access.

Neither the world of information, nor the human desire for it, has a limit, although it is important to remember that a commitment to universal and open information access is not, itself, universal. Still, IFLA's international ILL Guidelines do include the “universal availability of published material” as an ideal (IFLA, 2009, <http://www.ifla.org/files/assets/docdel/documents/international-lending-en.pdf>), and global librarians, curious and interested in the world, are inspired by a vision of information access that supports individuals and cultures and real progress for all.

To those who do believe that everyone has an equal right to knowledge, learning and self-development, information is a common good, like clean air. It is the fuel required to solve global problems and to improve life for everyone. Solutions can come from anywhere, so librarians who help provide information access empower everyone to contribute. Of course, there remains information scarcity for billions of people who have neither reliable, affordable library, nor Internet, access. When there is a cost to information, choices must be made. However, those for whom the ideal of full egalitarian access is seen as crucial in a global society, the hoarding of knowledge or privileging of access is not the way forward.

In conclusion, the needs that ILL librarians meet are inspiring and poetic, and the volume and breadth of transactions they facilitate is impressive. Of course, ILL is as practical a library service as any, with the mechanics of keeping track of each transaction admittedly prosaic – sometimes, even plodding. However, those ILL staff members and librarians who consider each request to borrow or lend a book or article as a mission of direct benefit to individuals - and by extension to our global society - will be those most satisfied by their work. And, those people who believe that they can access any information, from anywhere, will be those most empowered and inspired to do great things. Therefore, for all who crave local, customizable and personal service in an increasingly globalized and technological world, it is not overstating the case to say that access to well-supported global ILL services is essential.

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# **BEYOND EMBEDDED: BLENDED ROLES FOR INFORMATION PROFESSIONALS IN THE 21<sup>ST</sup> CENTURY KNOWLEDGE ECONOMY**

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## ABSTRACT

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Twenty-first century librarians work with diverse populations with a variety of needs. Information users take multiple roles and institutional affiliations, collaborating across disciplines and domains of expertise. Librarians at the Gerstein Science Information Centre (Gerstein) of the University of Toronto Libraries (UTL) in Ontario, Canada have embraced the challenge of providing services that not only expand across traditional boundaries of public, academic and corporate information services, but also reach beyond a local user base. They meet this challenge by taking on embedded and blended roles as market intelligence information specialists at the MaRS Discovery District (MaRS), an innovation centre that works closely with the University of Toronto community. Working as a cohesive team, information specialists and industry analysts at MaRS serve clients that have diverse information needs, which span multiple industry sectors: information, communications and entertainment; life sciences; clean-tech and advanced manufacturing & materials; and social innovation. In the absence of a physical library, the market intelligence team leverages proprietary electronic subscriptions and publicly available information to deliver quality information services in a unique and sustainable way. This chapter will provide a case study that examines the growth of the operation from a single information specialist to a larger team over time, explains the current structure of the team, and explores the complementary strengths and skill sets of the various team members.

**Keywords:** MaRS Discovery District, University of Toronto Libraries, Gerstein Science Information Centre, not-for-profit, embedded librarianship, cross-appointed librarians,

information specialists, industry analysts, market intelligence, blended roles, entrepreneurship, innovation, academic librarianship, entrepreneurial community, higher education, university, regional economic development, technology commercialization, case study, interviews, alternative staffing models, information and communication technology, life science, social innovation, Cleantech, advanced materials, Canada, Ontario, MaRS Innovation

# **BEYOND EMBEDDED: BLENDED ROLES FOR INFORMATION PROFESSIONALS IN THE 21<sup>ST</sup> CENTURY KNOWLEDGE ECONOMY**

*“...the very essence of our profession has been to help make critical connections, particularly between ideas and people. Now, we must take that role even further.”*

*– Brenda L. Johnson, Ruth Lilly Dean of University Libraries Indiana University*

This chapter presents a case study of how academic librarians from the University of Toronto have taken on blended roles as market intelligence information specialists. Embedded within a non-profit innovation centre, the MaRS Discovery District, these librarians work in partnership with industry analysts to deliver research and information services to an entrepreneurial client base. In the absence of a physical library, their services rely on a suite of electronic resources that are outside the scope of traditional academic library collections and services. This case builds on the earlier work of Fitzgerald, Anderson & Kula (2010), which provided a detailed description of the partnership between the University of Toronto and MaRS Discovery District (hereafter referred to as MaRS). That work covered the founding of the partnership, and introduced the organizations involved, the characterization of clients, services and resources, as well as addressed the challenge of measuring the value of services provided. For these reasons, some of these aspects of this partnership will be reviewed only briefly here. The focus of this chapter is rather on how the roles of academic librarians and industry analysts became integrated into a team of market intelligence professionals over time within the context of this partnership. In addition to describing the current structure and

staffing profile of this team, the case explores the relative strengths of this multidisciplinary staff unit. The chapter concludes by considering how this case provides a model for academic libraries seeking alternative staffing models to better support their entrepreneurial communities; expanding on current notions of embedded and blended librarianship; as well as providing suggestions for future research.

## **Case Study Approach**

This exploratory case presents information gathered through participant-observation and interviews with Market Intelligence (MI) team members. Team members include current staff members, as well as one information specialist and one industry analyst who had each recently transitioned from the team to take on new roles within MaRS. In addition, the interviews included two staff members who are not members of the MI team, but who have worked closely with the team for several years. The authors, as current or ex-members of the MI team itself, conducted 10 individual in-person interviews in total with their colleagues. The interviews were designed to collect information about the interviewee's training and background and to explore their perceptions of the skills and qualities they personally contributed to the team, as well as how these might be similar or different from those contributed by their team members. As the authors were specifically interested in exploring differences between the librarians and industry analysts, interviewees were also asked to reflect on these distinctions and the respective strengths that each group contributed to the team. The interviews were conducted during the months of September and October of 2012, and later transcribed from recorded audio files. Individual interviewees' names were replaced with coded references from one to ten, each with a prefix of either "L", for librarians or staff with graduate library and information studies training, "A" for industry analysts, or "N" for neither. The

transcriptions and the authors' own observations regarding the team's structure and organization were then analyzed to highlight concepts that seemed to be "top-of-mind" and "recurrent": "top-of-mind" concepts included those that were stated early and easily in the interview process, while "recurrent" concepts were those that occurred in more than one interview.

## Context

### The MaRS Discovery District (MaRS)

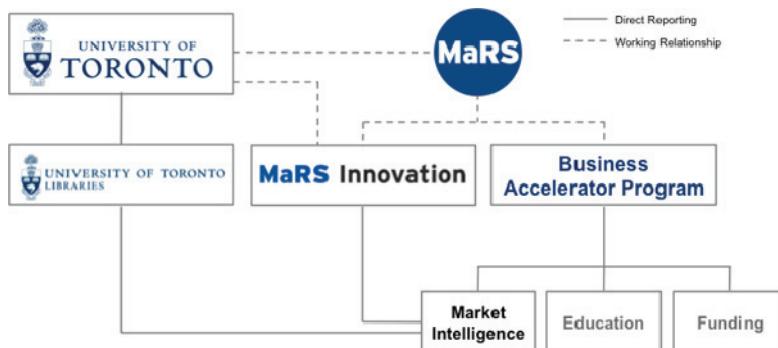
MaRS is a non-profit innovation centre based in downtown Toronto, in close proximity to the University of Toronto, and in operation since 2005. It houses the MI team that provides secondary research services to the entrepreneurial ecosystem in Ontario, Canada. This ecosystem includes the technology transfer and commercialization offices of colleges, universities and teaching hospitals, as well as independent early stage technology-based entrepreneurs across Ontario.



**Figure 1. MaRS and surrounding area in downtown Toronto, Ontario**

The MI function is currently supported collaboratively by a provincial government initiative called the Business Acceleration Program (BAP), MaRS, its sister organization MaRS Innovation, and the Gerstein Science Information Centre (Gerstein) of the University of Toronto Libraries (UTL). The first three entities together provide a broader suite of commercialization, advisory, education and funding programs. Clients of MaRS and MaRS Innovation, many of which hold affiliations with the University of Toronto, access these programs, including the MI service, through staff and volunteer advisors, who are organized into the following industry-specific groups or “practices”:

1. Information technology, communication and entertainment
2. Life sciences
3. Clean technologies and advanced manufacturing & materials
4. Social innovation

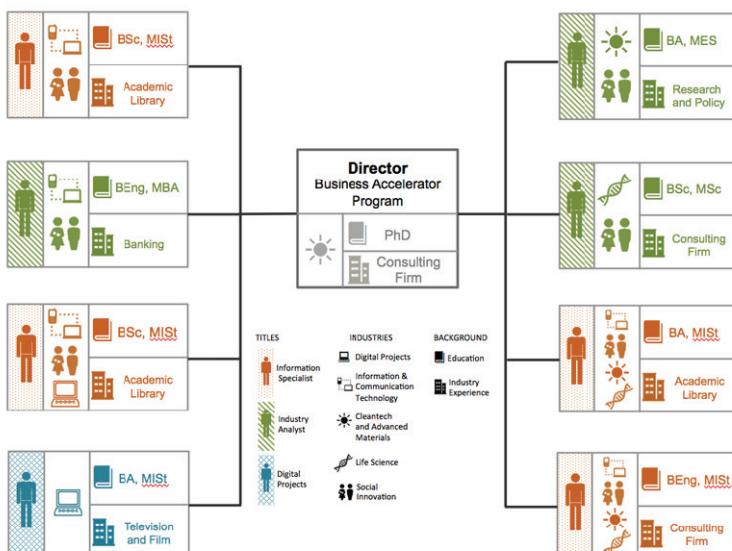


**Figure 2. Partnership between MaRS and University of Toronto Libraries**

## Market Intelligence (MI) Team Structure Today

The current MI team's organization reflects the structure of MaRS' advisory practices. The team consists of eight members, with subject specializations in the life sciences, information and

communications technology, clean technologies and advanced manufacturing & materials, and two roles that span across two or more sectors. The team as a whole brings a diversity of academic backgrounds and work experiences, and is managed by the Director of BAP. Half of the staff hold the title of 'Information Specialists' and have completed a Masters of Information Studies (or equivalent). Three of these information specialist positions are cross-appointments between UTL and MaRS. The other half of the team each hold the title of 'Industry Analyst' and have completed Masters degrees in areas related to business, science and/or technology. Team members typically bring a minimum of 2 years of post-Master's professional work experience in their specializations prior to joining the team. At the time of the interviews, the number of years each member had been with the team ranged from 1 month to 4 years. Figure 4 provides a summary of the academic and professional backgrounds of the current team members.



**Figure 3. Staff profile of the MI team**

Since the initiation of the service, the core mandate of MI has been the provision of secondary research<sup>1</sup> services to clients. However, over time, the portfolio of services has expanded. In addition to secondary research, staff members now organize events, which are designed to bring together relevant stakeholders in a particular sector to discuss the state of the industry, emerging technologies and trends, as well as to highlight opportunities for inventors and entrepreneurs. These events range from panel discussions and webinars with database vendor analysts to “hack-a-thons”, where for example, clinicians and health care providers come together with software designers and developers for a weekend to prototype real-world solutions. Team members also publish whitepapers that serve a similar function, which draw on both secondary research and interviews with relevant stakeholders. Team members may also lead or collaborate on special projects, such as the development of the ‘Startup Library’ (<http://marscommons.marsdd.com/startup-library>), an online guide to publicly available resources for conducting secondary research on technology markets. Members also engage in outreach and instruction activities with university and college-based entrepreneurship programs in Ontario. Lastly, all team members play a role in managing electronic resource subscriptions at MaRS, with members taking the lead on resources that align with their individual sector or subject specializations.

## **Team Development Over Time**

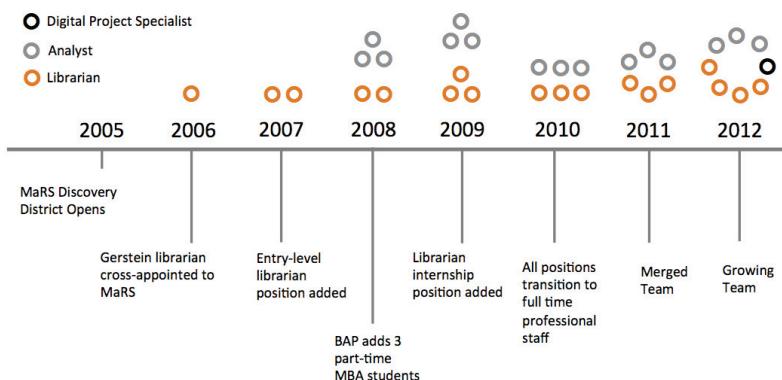
The MI service originated with one cross-appointed librarian from Gerstein in 2006. By 2007, the service grew to include two information specialists: one was a senior person with several years of professional work experience, while the other was a recent graduate of a Masters of Information Studies program. At that time, the information specialists

primarily focused on sourcing secondary information from academic sources, supplemented by a few MaRS-licensed databases, and managed document delivery for clients and staff at MaRS. Most of the core clients were based within the Greater Toronto region. By 2008, a parallel province-wide information service was launched as part of the Business Mentorship and Education Program (BMEP), a program administered by MaRS on behalf of the provincial government. This new service was initially staffed by three part-time MBA student internships. Each internship position lasted for four months, after which time a new set of students were brought into these roles. By 2009, this staffing arrangement transitioned to three full-time professional industry analyst positions. During this time, the analysts provided detailed, in-depth analysis for clients, using both subscription-based and publicly available information. Around the same time, the information specialist-staffed service also added an internship position to meet the growing demand for services. Similar to the evolution of the analyst-staffed service, the internship and entry-level positions held by information specialists later transitioned into fulltime professional information specialist roles. Through out this transitional time the information specialists and analysts maintained distinct reporting lines: the information specialists reported to the Director of the Gerstein; and the analysts reported to the Director of MI. In 2010, the BMEP became the Business Acceleration Program (BAP), which continues to deliver services through a distributed system of Regional Innovation Centres (RICs) across Ontario.



**Figure 4. MaRS Discovery District among a network of RICs across Ontario, Canada**

By early 2010, MI began to operate as a unified service with a much more cohesive multi-disciplinary team of professionals, who brought comparable levels of education and experience, and who performed a similar set of duties and responsibilities. The reporting structure changed so that both the information specialists and analysts reported to the Director of BAP, while the cross-appointed information specialists also continued to report to the Director of Gerstein. Figure 5 provides a summary of how the staffing profile of the team evolved over time.



**Figure 5. Evolution of MI team over time**

A number of contextual factors encouraged this integration, as well as the subsequent blending of roles. The growth of the service and the resulting increase in the volume of information requests led a need for process efficiencies. This need in turn led to consolidated, practice-specific request queues and a more collaborative approach to content evaluation and licensing. Staffing changes and the maturation of MaRS as an organization, and of BAP as a program, likely contributed to the development of an integrated team. A colleague who has been working closely with the MI unit since the beginning of the BAP, but who is not a member of the team, noted that the information specialists and industry analysts “didn’t really come together, I don’t feel, until the last two years really, where it’s been slowly building and integrating...” (N10, personal communications, 2012). She further observed that while work processes and resources have not changed significantly over this time, it has been the team itself that seems to have evolved in its ability to reach the entrepreneurial community more successfully. “What’s changed,” she noted, “is the team structure and the people and how it’s been resourced and how much market intelligence has sort of exploded...” (N10, personal communications,

2012). By 2012, the integrated nature of the team was easily perceived by even the newest member, an analyst who had joined the team less than a month prior to the interview, as she stated: "I like how we have the diversity of people here... not too many people that know a lot in one thing and then not enough in another. It seems that it's a really balanced team" (A7, personal communications, 2012). This notion of "balance" is further explored in the next section by comparing the relative strengths of information specialists and industry analysts in delivering MI services at MaRS.

## **Exploration of Relative Strengths**

The timeline in Figure 5 in the preceding section may suggest that the current composition of the MI unit, with its mix of information specialists and industry analysts, happened organically – as a result of two information services merging into one. In fact, a deliberate decision was made early on in the history of the MI function to maintain a mix of staff members who came from a variety of professional training and backgrounds. Through the exposure of working with librarians in the early stages, the Director of BAP came to recognize the relative strengths that information specialists could bring to a team of analysts with scientific, technical and/or business backgrounds:

"I'll be honest and say when I first came, I hadn't worked with information specialists before, so I didn't know what their strengths were, how they look at research, but it has been so rewarding for me to understand... and that's when I made the decision that this team has to be mixed." (personal communications, 2012)

This section presents some of the ways in which MI team members perceived the strengths of their own skill sets as well

as those of their colleagues, and some of the broader characterizations that were made about information specialists as one group and industry analysts as another.

## **Strengths: Information Specialists**

The three top-of-mind and recurrent strengths associated with information specialists as a group included their expertise in searching for information, and their knowledge of various sources that were both proprietary and publicly available online. Related to the variety of sources that information specialists relied on, this group was also associated with a greater breadth of knowledge, and the ability to deal with a wider range of information requests than the industry analysts.

**Searching & Sources.** Interviews with team members identified a key strength of information specialists to be their advanced ability to search for information, as well as deep knowledge of a broad range of information sources. These two qualities were perceived as particular strengths of information specialists by both the specialists themselves and the analysts. One information professional felt that “we are more specialized in finding the right source in [a] more efficient way and compiling the information in a more structured manner” and in turn “may have more experience [here] than the industry analysts” (L3, personal communications, 2012). Another information specialist explained how her previous experiences working in a variety of academic libraries that specialized in the health sciences, engineering and business, helped her to become familiar with a variety of specialized information sources. She shared that these experiences proved to be “the perfect combination,” as she was “able to learn all sorts of different databases” (L4, personal communications, 2012). Analysts made similar observations, with one analyst team member noting the following:

“I think just being able to source information and the right information and know what’s relevant, what has the right context, is definitely a skill that the information specialists have that the industry analyst may not necessarily have. I think that’s a result of their training.” (A6, personal communications, 2012)

Another analyst shared how advanced he perceived information specialists’ search skills to be with the following statement: “Half the time when I’m doing my work... there’s a request that comes in, I’m always thinking ‘probably [L4] would know this better than I would’ ” (A8, personal communications, 2012). One of the newer members of the team also felt that the information specialists were “more a go-to for questions about databases than maybe the industry analysts” (A7, personal communications, 2012).

**Breadth of Subject Knowledge and Perspectives.** A number of interviewees also commented on the breadth of knowledge that information specialists bring to the team. One information specialist addressed this ‘breadth’ advantage as follows:

“... we are really good at thinking more broadly about how to search for something. Just from having that librarian background with cataloguing and search and taxonomy types of skills, I think we think about where to find things in a different way... If [analysts] are having trouble, they will often come to librarians to say, ‘have you ever been able to find something like this?’ ” (L3, personal communications, 2012)

Another information specialist believed that providing a breadth of perspectives perhaps allows more objectivity in the deliverables provided to clients:

"I feel like we're the ones who are able to think more broadly... and to provide a broad spectrum of sources... I think we're more objective in the stuff that we provide, where if you have an MBA background, you're always trying to support the case for X and try to find evidence for that." (L4, personal communications, 2012)

A colleague who sits outside the team observed a similar difference in the approaches taken by information specialists and analysts when finding information:

"... information specialist types are a bit more curious and inquisitive and just have a different way of addressing or looking at a question, almost like in a problem solving sort of way, whereas... analysts... take a much more direct business analytical approach and look for supporting evidence around that..." (N10, personal communications, 2012)

One analyst on the team summarized the relative strengths of analysts and information specialists with respect to breadth versus depth of knowledge in the following way:

"I think there is a difference in terms of strengths on either side. The information specialists have a broader sense of the information landscape, what information is available and how to access it, which I find to be very complementary because that's definitely an area which I don't have the knowledge in. I would almost call it a breadth versus a depth... I think the industry analysts are more deep in their specific industry and the information specialists definitely have much more breadth." (A6, personal communications, 2012)

**Range of Information Requests.** A number of interviewees also correlated the information specialists' breadth of knowledge with their ability to deal with vague or ambiguous client requests that may fall outside of individual analysts' specializations. One information specialist reflected on how her prior training and experience as a business librarian helped her handle questions that were ambiguous:

"I was fairly comfortable dealing in cases where the search wasn't particularly well defined, or it was somewhat ambiguous, or it was perhaps even a little bled across multiple disciplines... business librarianship prepares you to kind of jump across a fair number of topics and kind of develop the ability to become an 'expert' fairly quickly, or at least a jack of all trades..." (L2, personal communications, 2012)

Correspondingly, one colleague outside the team observed that the analysts seemed to feel less comfortable than information specialists when responding to some of the "more vague questions". She felt that the analysts may "feel lost" in terms of "where they should go find that information" (N9, personal communications, 2012).

## Strengths: Industry Analysts

The top-of-mind and recurrent strengths perceived of the industry analysts, included subject matter specialization, expertise derived from experience working within a relevant industry, and their reliance on professional networks.

**Subject Matter Specialization.** Subject matter and industry specialization were clearly perceived by interviewees as the key strengths of the analysts. As one information specialist observed:

“In terms of the broadness of our knowledge, I think probably we’re pretty good, but in terms of the depth of the knowledge, probably we... lack in that aspect [compared to] industry analysts.” (L3, personal communications, 2012)

The analysts clearly valued the level of specialization in their field. In speaking about her past training and experience as an engineer, one analyst felt that her industry knowledge was “very critical” to her role as an analyst in the MI team (A6, personal communications, 2012). Similarly, one of the analysts described himself as “basically the go-to person for anything life sciences” (A8, personal communication, 2012).

Compared to the breadth of knowledge that seemed to aid information specialists’ ability to search, it was the analysts’ depth of subject matter expertise that was identified as a driver of search performance. As one information specialist explained, she felt that “analysts bring a level of expertise in their subject domain that [she] simply couldn’t replicate” (L2 personal communications, 2012). She perceived that this knowledge helped analysts map research queries “very quickly into search terms that they can search against” (L2). Another information specialist described one analysts’ strength in terms of technical precision in responding to information requests:

“[A6] is more precise with her language because of the technology. Whereas I find that we’re more, not general, but we focus on different things. We focus on the resources.” (L1, personal communications, 2012)

**Industry Expertise.** In addition to the subject specializations of industry members, a recurrent strength of the analysts was their industry experience, whether as engineers, scientists, or entrepreneurs. One former analyst reflected how her previous experience in a business development role in a technology-

based startup company assisted her in her work within the MI team. She stated that because she was “actually able to wear the entrepreneur’s shoes” and “experienced what the entrepreneurs experience”, she was able to understand some of the “specific needs of the entrepreneurs and then translate that need into information” (A5, personal communications, 2012). Another analyst reflected:

“Maybe where the industry analysts have an easier time is when it comes to aspects of thought leadership or understanding opportunities in a specific industry or a subset of that industry, maybe being able to counsel one-on-one without needing to rely on external knowledge sources...” (A6, personal communications, 2012)

An information specialist shared a similar sentiment, having noticed that analysts tend to rely on their own experience, whereas information specialists tend to rely on external sources by focusing on “new things being published, new information sources, [and] monitoring what publishers are doing” (L4, personal communications, 2012).

**Personal Network.** In line with the emphasis on industry experience by the analysts, the ability to draw on professional networks as a preferred source of information emerged as particular strength among the analysts. As one analyst shared:

“I may rely a little bit more on my previous experiences or the people in my network to formulate opinions and form an understanding of a certain industry as opposed to... relying on a slew of credible sources to do runs of analysis and figure out what is this industry all about...” (A6, personal communications, 2012)

Another analyst pointed to access to industry contacts through personal networks as a key differentiation between information specialist and analysts. She stated that the deliverables provided by an information specialist or an industry analyst are “pretty much the same.” The only difference she perceived were in the interactions the analysts had with their specific sector, and their professional connections within it, since “as an industry analyst, you actually had the opportunity to play in a specific field” (A5, personal communications, 2012). One information specialist also perceived this difference: “In terms of connecting with industry people, I think industry analysts, they seem more comfortable... because... they’ve already had the experience dealing with those people already” (L3, personal communications, 2012).

However, industry analysts were not the only ones highlighting their professional networks as significant contributions to the team. Information specialists also perceived their ability to draw on their networks as an important strength, albeit in a different way than the analysts. The information specialists valued their ability to reach out to their networks for finding relevant sources of industry information from other information professionals working in a diverse range of industries. One information specialist shared that what she found “hugely helpful” was being able to leverage the full network of subject specialists at the UTL, as well as relationships with experienced information specialists at other corporate and special libraries (L2, personal communications, 2012). To illustrate her point she offered this example:

“If you had a question... from... a tech startup who was targeting HR, [and] you weren’t quite getting the answer you wanted— to be able to reach out to someone at HRPO [Human Resources Professionals Association of Ontario] and their information center—

that's pretty significant added value I think that you can bring." (L2, personal communications, 2012)

## Summary

A wide range of skill sets and strengths were identified throughout the various interviews with current and former MI team members. Some of those strengths were unique contributions of individuals while others appeared more generally applicable to either information specialists or industry analysts as groups. From that complete list, strengths that were considered top-of-mind and recurrent were highlighted and compared here. Table 1 provides a summary of the concepts that emerged as the relative strengths of the two roles.

Table 1: Relative Strengths of Information Specialists and Industry Analysts

Information Specialists	Industry Analysts
<ul style="list-style-type: none"><li>• Advanced searching skills</li><li>• Knowledge of sources</li><li>• Breadth of expertise</li><li>• Ability to handle a range of information requests</li><li>• Seek objectivity</li><li>• Reliance on professional networks (of information professionals in diverse industries)</li></ul>	<ul style="list-style-type: none"><li>• Subject matter specialization</li><li>• Technical precision</li><li>• Depth of industry expertise</li><li>• Focused analytical approach</li><li>• Seek evidence to support a claim</li><li>• Reliance on professional networks (contacts within a specific industry)</li></ul>

It should be noted that individual team members likely have a blend of these various strengths and skill sets. The groupings are, however, still useful to articulate some of the relative strengths that may be generalized to each group. This comparison is also useful in that it suggests how the *relative* strengths and skills of one group can also *complement* the other, so that the team as a whole can bring

a balanced set of competencies for delivering MI services across multiple sectors.

## Implications

This case has provided a description of how academic librarians have been able to take on blended roles as market intelligence professionals in close collaboration with industry analysts. It has also explored some of the relative and complementary strengths and skill sets that each group can bring to a multidisciplinary team. In particular, the staffing profile as well as the evolution of the team structure has been discussed in detail to the extent that it may provide an embedded model for academic libraries seeking to better support their entrepreneurial community. Today, more than ever, user communities are composed of individuals who take on multiple roles and institutional affiliations, collaborating across disciplines and domains of expertise. This fluidity is especially the case in the user communities served by academic libraries. Scholars and scientists collaborate and compete in an international context and interdisciplinary research is becomingly increasingly common (Knapp, 2011; Brown & Swan, 2007). This dynamic has become pronounced as academic institutions more frequently engage in entrepreneurial activities (Mars, 2006). Academic collaborations taking place today are not limited to working with other academic institutions, but rather with some combination of industry, government and not-for-profit sectors (Research Information Network, 2011; Whitchurch, 2010; Parsley & Weerasinghe, 2010). The model described in this chapter directly evolved out of a need to better serve a complex and challenging user base, a need that likely exists across academic institutions and regional innovation clusters around the world. Developed through a series of deliberate decisions as well as a continuing process of trial and revision, this

particular model has proved successful to the extent that the service has not only been sustained, but has grown steadily over the past six years. It is hoped that other academic libraries and innovation centres will draw on this model as they seek to enhance their delivery of information services to an equally complex user group.

This case also builds on current discussions in the library literature, which seek to understand and promote concepts of embedded and blended librarianship. Libraries in all sectors have been experimenting with digital collections and service models to meet the evolving and increasingly complex needs, as well as sophistication, of their users. The embedded concept has gained popularity among libraries as a way to develop closer working relationships with their user communities and to deliver greater value than a simple Internet search can provide. As Shumaker convincingly argues:

“The push to innovate comes from the clear fact that the traditional model of reference services no longer works - which reflects how technological social changes have changed how people use information. The pull to the embedded model derives from major trends that emphasize the importance of the knowledge worker.”  
(Shumaker, 2012, p. 21)

On the one hand, academic libraries have developed blended librarian models where traditional library skill sets have been blended with that of instructional design and technical expertise related to digital projects (Shumaker, 2012; Shank & Bell, 2011; Corrall, 2010). On the other hand, with the closing and outsourcing of many corporate libraries in the past several years, librarians in those settings have transitioned to take on increasingly blended roles as analysts or information specialists supporting competitive intelligence functions or internal knowledge management projects (Shumaker, 2012).

This case has provided an example of a new kind of blended market intelligence role for academic libraries that is similar to cases seen in corporate, nonprofit and government organizations. As such, this case also adds to the relatively sparse information that is available on embedded librarianship in the corporate sector when compared to other sectors such as higher education and healthcare (Shumaker, 2012). Lastly, this chapter lends further support to the claim that when information specialists are “embedded into teams where their unique cognitive tools are appropriate, they can make an irreplaceable contribution to the work of the team” (Shumaker, 2012, p. 38-9).

## **Directions for Future Research**

It is hoped that this case has been useful in generating new kinds of questions for future research related to information services and the management of work teams. Participant-observation presents a number of weaknesses as a method, including the potential bias in portraying cases in an overly positive manner, overstating successes and understating problems (Yin, 2003). The method, however, is used here not to lay claims on any objective truth but rather to explore factors that may be of importance in future research where such claims may be supported through a variety of investigative methods. For this reason, the participant-observation method has been used here for the benefit it offers in terms of providing access to the inside perspectives of a unique group, which would be inaccessible otherwise (Yin, 2003).

To overcome the perceptual bias associated with this case, a future study might compare the actual deliverables prepared by information specialists with those of industry analysts to identify significant differences between them. Another study might compare this particular model with how other innovation centres

and academic libraries provide information services to their entrepreneurial communities. The management literature in particular has been interested in interorganizational collaborations for their potential to “increase cost-effectiveness, enhance the capacity of partnering agencies, and increase the comprehensive nature of services” (Isbell, 2012, p.159-60). More specifically, boundary-spanning activities of inter-organizational teams have become a focal unit of study as “organizations are increasingly blending their competitive strategies with cooperative strategies” and are “using interorganizational teams to manage environmental turbulence, rationalize interdependence, and improve their competitiveness, flexibility, and responsiveness to complex patterns of clients” (Drach-Zahavy, 2011, p.89). Future research could be developed through this particular lens to consider how information specialists may contribute their unique strengths in the boundary-spanning activities of interorganizational teams.

## Conclusion

Commentators in the library and information sciences have argued since the 1970s that “the diffuse nature of the emerging market for information workers would bring significant competition from business schools and information systems programmes” (Corrall, 2010, p. 573). In contrast, the case presented in this chapter has shown how professionals trained in different domains, but all dealing with information, can integrate their complementary strengths as a balanced team of knowledge workers. Furthermore, as user communities move beyond the traditional limits of academic institutions, this chapter has shown how one library has shifted its vision of the information services they must be prepared to provide. Information specialists from Gerstein have stretched and adapted traditional concepts of library and information science in new and inventive ways by partnering with MaRS, thereby taking on blended roles as market intelligence professionals.

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## **Footnote**

<sup>1</sup> Secondary research refers to data (and analysis) collected by other organizations and individuals engaged in primary research. Primary research involves the collection of data directly from the population being studied through methods such as surveys, focus groups, interviews or observation. In the MaRS context, secondary research involves the identification and selection of reports from market research publishers, and the search and retrieval of relevant data and analysis from article databases and public sources.

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